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# Perceptions of principals as to the degree of implementation and effect of the middle school concept in Louisiana

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**PERCEPTIONS OF PRINCIPALS AS TO THE DEGREE  
OF IMPLEMENTATION AND EFFECT OF  
THE MIDDLE SCHOOL CONCEPT IN  
LOUISIANA**

by

**Susan N. Shofner, B.S., M.Ed.**

**A Dissertation Presented in Partial Fulfillment  
of the Requirements for the Degree  
Doctor of Education**

**COLLEGE OF EDUCATION  
LOUISIANA TECH UNIVERSITY**

**August 2001**

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July 3, 2001

Date

We hereby recommend that the dissertation prepared under our supervision by Susan Nelson Shofner

entitled Perceptions of Principals as to the Degree of Implementation and Effect of the Middle School Concept in Louisiana

be accepted in partial fulfillment of the requirements for the Degree of Doctor of Education

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Author Susan N. Shepherd  
Date July 18, 2001

## ABSTRACT

Turning Points: Preparing American Youth for the 21st Century (Carnegie, 1989) contained recommendations for improving middle level education. These recommendations included: (a) creating small communities for learning, (b) teaching a common knowledge core, (c) ensuring success for all students, (d) empowering teachers and administrators, (e) preparing teachers in middle grades, (f) improving academic performance through health and fitness, (g) re-engaging families in the education of adolescents, and (h) connecting schools with communities.

The objectives of this study were to determine, according to middle school principals, the extent to which the Carnegie recommendations have been implemented in the public schools of Louisiana that serve students in grades six, seven, and eight. The study also sought to determine if the perceived level of implementation has a positive effect on student achievement as reported by Seghers (1995).

Principals of 139 public middle level schools in Louisiana responded to the Middle Level Practices Questionnaire. Statistical analyses utilizing Analysis of Variance revealed significant differences in the perceived level of implementation of Carnegie's recommendations by grade configuration in the Health Promotion subscale and by school setting in the Governance and Decision-Making and Safety and Resources subscales. There were no significant differences by socioeconomic status.



Stepwise multiple regression analyses indicated significant relationships between Iowa Test of Basic Skills and Louisiana Educational Assessment Program index scores and the perceived level of implementation of the Carnegie recommendations in the Ability Grouping subscale. There were no significant relationships between student attendance and suspensions and the perceived level of implementation. A significant relationship between Governance and Decision-Making and student expulsions existed. A significant negative relationship existed between Health Promotion and teacher turnover.

Conclusions: (a) Louisiana middle level schools have not fully implemented Carnegie recommendations; (b) school demographics do not make an overall significant difference in the perceived level of implementation; and (c) the implementation of selected components contributes to school and student success.

Recommendations: (a) determining the most effective methods of staff development concerning implementation of the Carnegie recommendations; (b) comparing the level of implementation and student and school outcomes in states that have specialized middle level certification and those that do not; and (c) replicating this study utilizing a different survey instrument.

## DEDICATION

This dissertation is dedicated to the memory of my maternal grandparents, Frankye C. and Earl E. Parker. Their distinguished careers as educators profoundly influenced my life.

It is also dedicated to my parents, Jerry and Pat Nelson. From a very young age, they instilled in me the self-confidence and determination to set my goals high and work hard to attain them. They provided a loving, Christian home and have always been there for me.

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I will always be grateful to all of you.



## CHAPTER I

### INTRODUCTION

Educators are seeking answers to the problem of continued low performance of Louisiana middle school students on standardized achievement tests as compared to those of the rest of the nation (Cooney, 1998). Although all grade levels are included in reform efforts on the state and national levels, many students begin experiencing difficulties with the educational process when they are in middle school (Carnegie, 1996).

Officials from the Louisiana State Department of Education, along with representatives from 26 other states, participated in the Middle Grade School State Policy Initiative from 1989-1992. The project was sponsored by Carnegie Corporation of New York. This three-year program was intended to encourage state educational leaders to design reform efforts in schools serving 10 to 15 year-old students. Comprehensive professional development training programs for teachers and administrators were held throughout the state to encourage more school officials to implement the recommendations in Turning Points for Louisiana (1989). A Bureau of Middle Schools was also established within the Louisiana Department of Education to provide a support system and technical assistance for schools attempting the

implementation of Carnegie recommendations (Council of Chief State School Officers, 1992). This Bureau no longer exists following a re-organization that shifted priorities within the Louisiana Department of Education (LDE, 2000b). However, in conjunction with the Louisiana Middle Schools Association, the Louisiana State Department of Education has undertaken a Middle Level Education Initiative to assist middle school officials in improving the academic performance of their students (Harvison, 1998).

There appears to be consensus among middle level educators and theorists concerning the developmental needs of young adolescents and how school officials should address those needs (Beane, 1990; Eccles, Wigfield, Midgley, Reuman, Mac Iver, & Feldlaufer, 1993; Scales, 1991; Wigfield & Eccles, 1994). Educators, however, acknowledge that many young adolescents are at-risk and that, too often, school officials have not designed schools to serve their needs (Martin, 1993). Social forces have been blamed by some as contributors to the isolation felt by many young people, with educators in middle schools often setting their expectations for students much too low (Arnold, 1997).

Turning Points: Preparing American Youth for the 21st Century (Carnegie, 1989) was chosen more than ten years ago by middle level educational leaders in Louisiana as the guide by which effective middle schools should operate (LMGAC, 1989). The recommendations for middle school operation included the following: (a) creating learning communities, (b) teaching a common knowledge core, (c) creating opportunities for all students to be successful, (d) establishing a climate that empowers

teachers and administrators, (e) equipping teachers specifically for the middle grades, (f) emphasizing health and fitness as a way of improving academic performance, (g) involving families in the educational process of young adolescents, and (h) creating school and community partnerships.

While approximately 19% of the middle schools in Louisiana reportedly exhibited the Carnegie recommendations, implementation across the state has been intermittent (Council of Chief State School Officers, 1992). Many middle schools in Louisiana still operate as junior high schools instead of incorporating the middle school concept (Adams, 1993; Seghers, Kirby, & Meza, 1997). This phenomenon is not unique to Louisiana. Research has shown that although the decades of the 1980s and 1990s have produced more frequent implementation of recommended programs for middle schools than in the past, most middle level schools nationally still have not made much progress in incorporating the recommendations of Turning Points (George & Shewey, 1994).

The efforts to incorporate the Carnegie recommendations in middle schools focus on promoting the growth and well being of young adolescents (Manning, 1993). The ability of middle school leaders to understand the nature and needs of early adolescent students in order to effectively design schools to meet those needs is a contributing factor to the academic success or failure of these students (Martin, 1993; NMSA, 1995). Further, an effective middle school utilizes a curriculum and an organization designed with the needs of all learners in mind (Beane, 1990; Schurr, 1992).

### Purpose of the Study

The purpose of this study was to determine, according to middle school principals, the extent to which the Carnegie (1989) recommendations have been implemented in the public schools of Louisiana that serve students in grades six, seven, and eight. The study involved 139 schools designated as middle schools under the Louisiana Department of Education Accountability Program (LDE, 2000c).

Additionally, this study sought to determine if the perceived level of implementation of the Carnegie recommendations has a positive effect on student achievement as reported by Seghers (1995). Research has indicated that the focus of many middle schools has been toward implementing suggested instructional and organizational strategies and less on academic outcomes. In these instances, the reform effort has displaced the mission of the school. Research has shown that teaching and learning should be the focus of middle schools striving to prepare young adolescents for the future (Felner, Jackson, Kasak, Mulhall, Brand, & Flowers, 1997; Lipsitz, Mizell, Jackson, & Austin, 1997).

As with any change effort, reformers have realized that implementing the strategies suggested by Turning Points usually takes three to five years (Erb & Stephenson, 1999b). Research has indicated that achievement and other measures of outcomes usually get worse before they get better (Jenkins & Jenkins, 1995). This phenomenon, called the "J-Curve," has been observed in middle schools where school leaders are trying to implement the Carnegie recommendations. Researchers have also determined that the successful implementation of reforms such as teaming and

interdisciplinary instruction is directly related to the relationships found in the school (Erb & Stevenson, 1999b). The fact remains that determining the effect that the implementation of the Carnegie recommendations may or may not have on student achievement can serve as a guide for future reform efforts in the middle school (Lipsitz et al., 1997).

### Justification for the Study

Surveys have been conducted on a national level to determine the level of implementation of recommended educational practices for middle schools (Alexander & McEwin, 1989; Epstein & Mac Iver, 1990; Felner et al., 1997). However, the effects of external variables on outcomes and poor research designs have been cited as reasons that such research has not been convincing relative to the effects of new middle school practices (Strahan, 1992; Van Zandt & Totten, 1995).

Data have revealed that student academic achievement, attendance, and discipline are all affected in various ways by the implementation of the Turning Points recommendations (Clem, 1996; Weeks, 1991). Some researchers have reported that institutionalized middle school practices have shown increased student academic achievement as well as positive behaviors (George & Shewey, 1994; Lee & Smith, 1993; Russell, 1994; Sexton, 1999). However, these same studies suggested that further research was necessary to determine the level of implementation of these recommendations (Ritzenthaler, 1993; Weeks, 1991). Thrift (1992), while examining the degree of implementation of the middle school concept in the Baltimore City Public

Schools, suggested the need for more research to determine the correlation with student achievement.

Howley, DeYoung, and Theobald (1996) suggest that the structure of the middle school threatens rural communities by leading to the consolidation and closing of schools. Other researchers suggest that the middle school concept is a student-centered philosophy and a way of teaching and interacting with adolescents, not merely an organizational plan for school size and grade configuration (Swaim, 1996). Research is needed to determine whether, in fact, the middle school concept is being implemented in rural areas of Louisiana and, if so, its effect on student achievement (LDE, 2000c).

Adams (1993) and Seghers (1995) conducted research that indicated middle school leaders in Louisiana have been slow in implementing the recommendations contained in Turning Points (Carnegie, 1989). Since the State Department of Education first published its Turning Points for Louisiana: A Blueprint for Quality Middle Schools (1989) in response to the Carnegie report, many changes have occurred in education (LMSIC, 1998). However, through all of the changes, both social and educational in nature, standardized test scores of middle school students in Louisiana continue to lag behind the scores of those of most of the nation. Thirty-nine percent of eighth-grade students who took the National Assessment of Educational Progress (NAEP) scored below the basic level, with nearly two thirds of students in Louisiana scoring below the basic level (Cooney, 1998). By assessing the extent to which these recommendations have been implemented, educational leaders will be better able to assist those schools in need of help.

The current accountability movement in Louisiana, "Reaching for Results," has placed renewed emphasis on the importance of practices that have proven to be effective. Schools in Louisiana are now being held accountable for student performance and for helping students achieve high standards of learning (LDE, 1999). The first School Performance Scores (SPS) were reported in September 1999, and the aftermath produced efforts by educators throughout the state to strengthen academic programs with proven strategies (LDE, 2000c). School Performance Scores were computed utilizing a formula that converted a school's average criterion-referenced test scores (LEAP for the 21st Century—LEAP21), norm-referenced test scores (Iowa Test of Basic Skills—ITBS), average attendance rate, and student dropout rates to an index number ranging from 1 to 150 (LDE, 1999). Louisiana middle schools, with an average School Performance Score of 64.9 in the 1998-99 testing, ranked lower than the state's elementary schools, high schools, or combination schools (LDE, 2000c).

Seghers (1995) found some evidence that schools in Louisiana utilizing components of the middle school concept experienced increased academic achievement by students, fewer suspensions and expulsions, and reduced teacher turnover. More research, however, needs to be conducted in this area in order to make this determination on a broader basis (Seghers, 1995). Thus, an examination of the actual implementation of what many consider to be desired concepts in middle level schools and their impact on student achievement is necessary to assist middle level educators in designing programs that produce the desired results. Additionally, Uber (1991) found that the building level principal is extremely important in the development of a

successful middle school. Therefore, the perceptions of principals concerning the implementation of the middle school concept would be extremely valuable at this time.

As previously stated, the consensus of research conducted on a national level has indicated that the implementation of the recommendations made in Turning Points (Carnegie, 1989) has a positive effect on student academic achievement. However, a limited amount of data have been gathered in Louisiana middle schools since the introduction of the present accountability movement. Therefore, more research is necessary to determine the level of implementation, according to principals, of the Turning Points recommendations in Louisiana middle schools and the effects that each component has on student and school outcomes.

### Theoretical Framework

More than 60% of the nation's middle schools began during the late 1960s as an answer to school desegregation (George & Shewey, 1994). By moving the ninth grade from the junior high school to the high school and by moving the fifth and sixth grades from the elementary schools into new middle schools, school districts worked to achieve racial integration. The middle school served as a means to accommodate changing enrollment patterns through the 1970s and into the 1980s, the period in which the middle school gained national prominence. For more than 25% of America's middle schools, major components of the middle school concept have yet to be implemented. Instead, these schools continued to serve as the answer to social concerns or population shifts, not as a viable means of educating the young adolescent student (George, 1988).



Middle school opponents stress the fact that middle schools are designed to be larger than elementary schools, heightening the effect of poverty on student achievement (Howley et al., 1996). Although usually larger in over-all numbers of students than elementary schools, proponents of middle schools argue that the smaller communities of learners created by teaming counter-act any negative effects that may result from the total student population in middle schools (Swaim, 1996). However, 60.7% of students in Louisiana middle schools are eligible to receive free or reduced price meals and, therefore, were considered when examining the effects of educational practices such as the Carnegie recommendations (LDE, 2000c).

Exemplary middle schools have as their purpose the intellectual, social, emotional, moral, and physical developmental needs of students entering adolescence (Irvin, 1995). Adolescents between the ages of 10 – 15 years undergo: (a) rapid physical growth, (b) changes in moral reasoning, (c) the onset of abstract thinking, and (d) introduction to a range of social pressures. Simultaneously, the lifelong developmental tasks of forming a personal identity or self-concept, acquiring social skills, gaining autonomy, and developing character and a set of values are begun. Exemplary middle level programs foster appropriate programs, policies, and practices that encourage the development of these tasks in positive ways (Clark & Clark, 1993; Irvin, 1995; National Middle School Association, 1995).

The National Forum to Accelerate Middle Grades Reform describes high-performing middle schools as (a) academically excellent, (b) developmentally responsive, and (c) socially equitable. Rigorous academic standards challenge students

to use their minds in such schools. These standards also create small learning communities in which beneficial relationships support the total growth of students. Finally, high-performing middle schools have high expectations for all their students with expertly prepared teachers assisting children to produce high quality work (Lipsitz, 1999).

Placing the word middle in the name of a school is no assurance that the school is designed to work for adolescents. Some junior high schools exhibit characteristics of the middle level concept, and some middle schools still operate traditional programs that resemble high schools for younger students. Many middle schools still place students in tradition-bound classrooms where teachers lecture and students listen. In opposition to what research says should be in place, these schools often have (a) a six-period day with classes changing every 50 minutes or so, (b) heavy use of textbooks, (c) counselors who see students by appointment, (d) teachers organized by departments and teaching by subjects, (e) administrators who emphasize discipline and rules, (f) interscholastic athletics and other competitive activities, and (g) an emphasis on academic learning over enrichment and elective courses (Adams, 1993; Alt & Choy, 2001; Lounsbury, 1984; Seghers, 1995).

Quality middle schools are designed with a challenging core curriculum that emphasizes real-life skills. Schools that exhibit components of the Carnegie recommendations are usually found to enable students to be successful both academically and behaviorally (Cooney, 1999). Additionally, middle schools must address developmental issues that affect 10 to 15 year-old students if they are to show

utmost academic achievement. The success of middle schools will not only affect their students, but the nation as well (NMSA, 1999).

When researchers discuss gains in academic achievement in middle schools, they usually include middle schools that closely resemble the old junior high schools and those that have institutionalized the middle school concept. Therefore, there is often not much evidence of academic achievement gain. The type of school students attend has been shown to make a difference in the outcomes suggested as needed by Turning Points (Beane, 1999a). Long-term, intense commitments are necessary in order to cause lasting reform in middle schools (Beane, 1999b).

#### Research Questions

The following research questions and subsequent null hypotheses were answered by this study:

**Research Question (1):** What are the perceptions of principals as to the degree of implementation of the Carnegie (1989) recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total score on the MLPQ?

**Null Hypothesis (1a):** There are no significant differences in the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total score of the MLPQ by grade configuration.

Null Hypothesis (1b): There are no significant differences between school setting (rural, small town, large town, or city) and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ.

Null Hypothesis (1c): There are no significant differences between socioeconomic status (SES) and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ.

Research Question (2): Are the perceptions of principals as to the level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total score of the MLPQ related to desirable student and school-based outcomes?

Null Hypothesis (2a): There is no significant relationship between school index scores on the Iowa Test of Basic Skills (ITBS) and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ.

Null Hypothesis (2b): There is no significant relationship between school index scores on the LEAP for the 21st Century (LEAP21) and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate

sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ.

Null Hypothesis (2c): There is no significant relationship between student attendance and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ.

Null Hypothesis (2d): There is no significant relationship between the percent of suspensions and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ.

Null Hypothesis (2e): There is no significant relationship between the percent of student expulsions and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ.

Null Hypothesis (2f): There is no significant relationship between the rate of teacher turnover and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ.

### Limitations

The researcher was aware of some limitations to the study. Only public schools that educate sixth, seventh, or eighth graders and classified as middle schools by the Louisiana Department of Education were included. Therefore, the data represent this

segment of middle schools only. Information from private and parochial schools might be different.

Another factor that limited this study was the use of a self-perception inventory. Perception inventories are based on personal interpretation. Therefore, the responses of principals may have been based on differing interpretations to the questions.

As a result of these limitations, the results and implications of this study are applicable only to public schools in Louisiana. Similarity to Louisiana schools must also be considered when generalizing the results to other contexts.

### Definitions

1. Accountability - The resulting actions that are taken and decisions that are made based on a school's performance (LDE, 1999).

2. Advisory Program - Ongoing, scheduled meetings between specific teachers and identified small groups of students. These programs are designed to provide all students in the school with an adult who knows them and refers them as needed for special support services. These programs also provide a social bonding process to reduce student feelings of isolation and alienation (Stevenson, 1992).

3. Exploratory Course - A learning experience outside the core curriculum (English, reading, language arts, mathematics, science, social studies, physical education) based on student interest. Exploratory courses can be of varying time spans, dependent on available resource personnel, equipment and materials, and are often investigations for students into unfamiliar areas of skills, in which they discover strengths and interests (Clark & Clark, 1993).

4. Flexible Scheduling - Class time segments that are grouped to form a larger span in which the teachers may allocate appropriate daily time periods for varying instructional needs (Spear, 1992).

5. Growth Target - The number of index points a school is to gain in a 2-year period, according to the formula prescribed by the Louisiana Accountability Administrative Manual, utilizing the School Performance Score criteria (LDE, 1999).

6. Interdisciplinary Team Teaching - A group of two or more teachers representing varied disciplines who collaborate in areas such as goal-setting, develop thematic units of instruction, make schedules and calendar decisions concerning the needs of their common group of students (Forte & Schurr, 1993).

7. Intermediate grades - The grades between elementary and high school, encompassing all or parts of grades 5-8 (Hendry, 1975).

8. Junior High School – A school comprised primarily of grades 7-9, but also 6-9 and 5-9, and organized as a downward extension of the high school. Junior high schools are organized by subjects and departments, with a grade level configuration (VanTil, Vars, & Lounsbury, 1961).

9. Lead Teacher - A team coordinator. This teacher is responsible for gathering and disseminating necessary information and materials, conducting team meetings, assisting new team members, and teaching a significant portion of the school day (Epstein & Mac Iver, 1990).

10. Middle School - A school in between elementary and high school, covering at least three of the intermediate grades, beginning with grade five or six.

Middle schools are based on developmental needs of young adolescents, organized by interdisciplinary teams, with flexible organizational structures, using varied learning and teaching approaches (Alexander & George, 1981; NMSA, 1995).

11. School Performance Score (SPS) - An indicator of a school's performance, calculated using the CRT, NRT, attendance rate, and dropout index scores, multiplied by various weights as prescribed in the Louisiana Accountability Administrative Manual (LDE, 1999).

12. Transescence - The term used to refer to the stage of development which begins prior to the onset of puberty and extends through the early stages of adolescence (Eichhorn, 1966).

13. Varied Instruction - Altering the presentation and structure of educational content to meet the needs of students (NMSA, 1995).



## CHAPTER II

### REVIEW OF RELATED LITERATURE

This chapter is organized into five sections: (a) history of the junior high and middle school; (b) national consensus on middle school practices; (c) research in middle level education; (d) application of Turning Points to specific middle schools; and (e) the middle school in Louisiana.

#### History of the Junior High and Middle School

Middle level education has been of interest to scholars since the beginning of the nineteenth century, according to Lounsbury (1992) and Toepfer (1962). However, the first junior high school, specializing in the education of adolescents going through puberty, did not appear until 1909 (Lounsbury, 1992). The 1918 Report of the Commission on the Reorganization of Secondary Education, sponsored by the National Education Association, firmly established the need for the formation of a separate junior high school. This report suggested an elementary school for students ages 6 to 12 and two secondary schools. The junior high school would serve students for three years, preparing them to enter the senior high school. The concept of a junior high school caught on rapidly. By 1970, nearly 8,000 junior high schools were in existence (Barton, 1976).

Junior high schools were initially established for the purpose of introducing students to high school subjects at an earlier age (Gullatt, 1995). The mission of the junior high school later changed to one of bridging the gap between the self-contained elementary school and the discipline-oriented high school (Lounsbury, 1996). However, by the 1960s, criticism of the junior high school escalated. The main criticism was that the junior high school was too subject-matter oriented (Lorain, 1997).

The junior high school movement of the twentieth century was clearly designed to be a middle school (Alexander et al., 1969). Disillusionment in what was actually happening in the junior high schools is often cited as the most important reason for the emergence of a new middle school. The junior high schools had become miniature high schools (Gatewood & Dilg, 1975). It was out of this criticism, and the desire for a specialized school designed to meet the needs of young adolescents, that the middle school concept emerged (Swiger, 1987).

A proposal for an age-appropriate middle school was made by William Alexander in the 1960s (Barton, 1976). This middle school would be organized into grades 5-8 or grades 6-8 and would serve as an alternative to the traditional junior high school (Lounsbury, 1996). Justification for the emerging middle school was based on teachers' instincts and experiences as well as on a growing body of knowledge of maturation levels of adolescents (Milgram, 1994). Alexander stated that the school in the middle should be designed to serve the children in the middle. The youth between childhood and adolescence should be housed in the middle school (Alexander, 1984).

Several factors contributed to the growth of middle schools. The space race between the United States and the Soviet Union, caused by Sputnik, is credited with the academic obsession that ensued, especially in science and mathematics (Ornstein & Levine, 1993). James B. Conant (1960), former President of Harvard University, recommended new math and science initiatives for the middle grades, serving as a catalyst to the middle school movement. The earlier maturation of young adolescents indicated the need to relocate sixth graders from the elementary school setting and ninth graders to high schools (Toepfer, 1992).

School officials often cited finances as the main reason that schools were not organized into middle schools. Additionally, school officials were afraid that they would have difficulty staffing middle schools with certified teachers if a separate certification level was established (Hendry, 1975).

The structure of public school systems in the United States underwent a change toward middle schools between 1987-88 and 1997-98, according to the Digest of Education Statistics (1999). The number of middle schools increased 43% during this time, from 7,600 to over 10,500, as junior high schools declined by 27%, from 4,900 to 3,700. This growth is continuing, based on the conclusions of recent research indicating there are now over 12,000 middle schools in the United States (Alt & Choy, 2001).

#### National Consensus on Middle School Practices

Increased research addressing middle level education substantiates a national consensus on middle school practices (George & Shewey, 1994). According to George and Alexander (1993), "The national debate about common characteristics of middle

schools is over at least among active participants...” (p. 50). Research efforts have focused on the effectiveness of middle school programs. Past comparisons between junior high schools and middle schools have evolved into research that focuses on programs and practices utilized by a school (George & Shewey, 1994).

Middle level education was structured largely by the pressure to reform: (Clark & Clark, 1993). However, the pedagogical vision for middle schools originally differed little from junior high schools (George, Stevenson, Thomason, & Beane, 1992). No other educational reform movement has been as extensive or lengthy as that involving early adolescents (Lounsbury, 1996). A focused national consensus has emerged about characteristics of the most effective middle level schools (George et al., 1993).

Early adolescence, between the ages 10 and 15, is the segment of schooling included in middle level education. According to researchers, developmentally responsive middle level schools must be firmly rooted in the varied characteristics and needs of these youngsters. This concept is the heart of middle level education (Alexander & McEwin, 1989; Wiles, Bondi, & Sansom, 1993).

The successful middle school program is forward thinking and outcome-based. It is devoted to excellence in classroom instruction while motivating students to participate in broad-based learning and creative thinking. A successful middle school program also includes a search for life skills (Forte & Schurr, 1993). Exemplary middle level schools address the distinctiveness of early adolescence with various instructional and organizational features. Turning Points: Preparing American Youth for the 21st Century, recognized as the primary source to achieve consensus concerning middle

level education, made several recommendations for transforming middle level schools in order to effectively meet the needs of young adolescents (George & Alexander, 1993; Manning, 1993).

Small communities for learning as evidenced by (a) schools-within-schools, (b) student and teacher teams, and (c) small group advisories are a vital part of a middle school. A middle school will offer a core academic program that produces literate students who (a) think critically, (b) lead healthy lives, (c) behave ethically, and (d) are responsible citizens. Success for all students achieved by (a) the elimination of tracking by academic achievement, (b) the promotion of cooperative learning, (c) flexibility in instructional time, and (d) adequate resources for teachers is desirable in a middle school. Middle school teachers and administrators are empowered to make decisions about the experiences of middle grade students, including creative control by teachers and committees to assist principals to (a) set policy, (b) design curriculum and programs, and (c) implement them. Middle grade schools are staffed with teachers who are expert at teaching young adolescents because they have been specifically prepared for teaching in the middle grades. Improved academic performance will be gained through fostering health and fitness. Families are re-engaged in the education of young adolescents due to opportunities for meaningful roles in school governance. Finally, middle schools are connected with communities that ensure students' access to health and social services and after school activities (Carnegie, 1989).

The National Middle School Association presented its ideology on the middle school movement in a 1981 position paper, This We Believe. This document gave guidance to further the development of the middle school movement and consistency with which educators could improve education for adolescents (NMSA, 1995). According to the National Middle School Association, middle level schools that address the developmental needs of students will possess (a) educators committed to young adolescents, (b) a shared vision, (c) high expectations for all, (d) an adult advocate for every student, (e) family and community partnerships, and (f) a positive school climate.

Further, developmentally responsive middle level schools offer students the following: (a) curriculum that is challenging, integrative, and exploratory; (b) varied teaching and learning approaches; (c) assessment and evaluation that promote learning; (d) flexible organizational structures; (e) programs and policies that foster health, wellness, and safety; and (f) comprehensive guidance and support services (NMSA, 1995). These recommendations are generally recognized by educators, associations, foundations, state boards of education, and researchers as essential for an exemplary middle school. The key components which emerged from these recommendations were interdisciplinary teaming, advisory programs, varied instruction, flexible scheduling, exploratory programs, and transition programs (Felner et al., 1997; NMSA, 1995; Van Zandt & Totten, 1995).

### Interdisciplinary Teaming

The heart of the middle school, interdisciplinary teaming refers to the organizational structure of a core of teachers assigned to the same group of students.

Several configurations have been successful ranging from two to five team members in two, three, or four subject areas. Teaming provides the structure to support two essential aspects of middle level education: (a) a positive psychosocial environment that allows flexibility and variety and heterogeneous grouping of students, and (b) a structure to plan and deliver a curriculum that balances academic and humane factors. Because teachers share the same students and have a common planning period, they are able to respond more quickly to the needs of individual students through (a) collaboration, (b) meeting jointly with parents, and (c) designing thematic units which foster the transfer of ideas among disciplines and increase relevance (Erb & Doda, 1989; Flowers, Mertens, & Mulhall, 1999; Flowers, Mertens, & Mulhall, 2000; Golner & Powell, 1992; Keefe, Clark, Nickerson, & Valentine, 1983; Mac Iver & Epstein, 1993; NMSA, 1995; Warren & Muth, 1995).

In schools where teaming is expected to occur, several factors usually determine whether or not it will be successful. Teachers involved on a team should (a) have a common planning time, (b) be able to communicate with each other effectively, and (c) collaborate in planning instruction. Further, for the greatest potential for success, teams should be assembled based upon the compatibility of team members (George & Lawrence, 1982; Flowers, Mertens, & Mulhall, 2000).

As recently as 1990, researchers had concluded that most middle schools (60%) were not using interdisciplinary teaming although academic productivity had been shown to increase in those that were (Epstein & Mac Iver, 1990). However, Valentine and Whitaker (1997) found that, by the middle of the decade, more than 50% of the

middle schools in the United States had incorporated some form of teaming as the organizational structure.

In schools that have implemented interdisciplinary teaming, various leadership traits emerge in teachers as they are given opportunities to share in decision-making activities (Polite, 1993). However, if team members do not share the vision for the team's efforts or fully understand their roles and responsibilities, teaming will not be successful (Forte & Schurr, 1993).

The concept of interdisciplinary teaming not only places students with a team of teachers, but provides for an integrated curriculum. The involvement of a team of teachers in developing and implementing an interdisciplinary unit of instruction reinforces the relationships of the various subjects, thus providing students greater meaning as they endeavor to expand their knowledge (Bragaw, Bragaw, & Smith, 1995).

Interdisciplinary teaming, when properly implemented, offers advantages for teachers and students. Collegiality, through shared goals and greater collaboration, provides teachers with a strong support system and intellectual stimulation. Student behavior is improved due to varied teacher personalities and strategies. Time management also improves for teachers through team meetings and common planning periods (Forte & Schurr, 1993).

Students participating in interdisciplinary teaming gain a greater sense of identity through team relationships. Attendance and behavior have also been shown to improve in students due to consistency of rules and procedures. Perhaps most



importantly, teaming offers students varied instructional materials and techniques which lead to greater motivation and achievement (Forte & Schurr, 1993).

There are nearly as many variations of interdisciplinary teams in operation as there are middle schools today. However, research has indicated several principles that should be implemented for effective teams: (a) keep teams small, (b) keep students on teams for the majority of the school day, (c) provide sufficient team planning time, (d) designate spaces in the building as team areas, and (e) keep teams of teachers together for at least three years (Erb & Stevenson, 1999a).

If school districts are to continue incurring additional costs to allow middle schools to implement teaming, steps must be taken by teachers and administrators to be certain the money is well spent. According to Rottier (2000), there are several things that will facilitate an effective implementation of teaming, including the following: (a) improving the foundations of teaming by establishing measurable team goals, sharing the workload among team members, and determining team ground rules; (b) demonstrating greater discipline in the use of common planning time, and (c) improving the team's capability of making decisions. Additionally, (d) solving problems, and managing conflict, (e) improving leadership at the team and building levels, and (f) providing team members with ongoing staff development assist with the implementation of teaming (Rottier, 2000).

### Advisory Programs

Advisory programs consist of a small group of students (usually 20 or fewer) assigned to a teacher, administrator, or other staff member. Advisory groups meet regularly to discuss topics of concern to students. The purposes of advisory groups are to develop close, trusting relationships between students and adults and to increase involvement with learning and feelings of positive self-esteem and belonging (Mac Iver, 1990; Stevenson, 1992). According to Burkhardt (1999), "Students being known and knowing that they are known by the adults in the building is at the heart of advocacy" (p. 52). Teacher advocates are not intended to replace the guidance services provided by counselors, but rather to expand those services to reach every student in the school. Teachers do this by supporting the personal and academic development of a small group of students (Bergmann, 1997).

Social and academic support activities of advisory programs include: (a) discussing problems with individual students, (b) giving career information and guidance, (c) developing student self-confidence and leadership, and (d) discussing academic issues, personal or family problems, social relationships, peer groups, health issues, moral or ethical issues and multicultural issues/intergroup relations (Burkhardt, 1999; Mac Iver, 1990). Ziegler and Mulhall (1994) studied a Canadian advisory program and found an increase in decision-making, the sense of belonging to the school, and teacher-student relations. Teacher advisories also help create more positive school climates, develop students' self-concepts, and prevent dropouts (George & Shewey, 1994; Mac Iver, 1990; Mac Iver & Epstein, 1993).

An advisory program should be more than just another activity undertaken by the school. It should strive to develop quality teacher-student relationships and become an integral part of the curriculum, thereby giving students needed attention individually, and preventing them from falling between the cracks (Stevenson, 1992).

Successful advisory programs do not happen by accident. According to researchers, all staff members must believe that the program is important and receive extensive in-service prior to implementation (Ayres, 1994; Shockley, Schumacher, & Smith, 1984). A successful advisory program requires teachers to work in different role capacities, using different classroom strategies and techniques of communication. The staff development necessary to produce this kind of program requires careful planning and preparation. Goals for each grade level should be established, keeping in mind the developmental changes students experience during these adolescent years (Ayres, 1994).

### Varied Instruction

Diversifying instruction to accommodate individual differences in students has been proven to increase academic achievement. Based on this information and research concerning the developmental characteristics of adolescents, middle school teachers are challenged to utilize varying activities that diversify presentations and increase the potential for complimenting individual learning styles, needs, and capacities (Dunn & Dunn, 1993; NMSA, 1995). Varied teaching and learning approaches connect the curriculum with assessment, a vital element in effective middle schools. If curriculum is

to be challenging, integrative, and exploratory, then the teaching and learning practices selected must also be challenging, integrative, and exploratory (Brodhagen, 1998).

Varied instruction can include the following: (a) integrating learning experiences, addressing students' own questions and focusing upon real life issues relevant to the student; (b) actively engaging students in problem-solving and accommodating individual differences; (c) emphasizing collaboration, cooperation, and community; and (d) seeking to develop good people, caring for others, democratic values, and moral sensitivity. Some of the more common programs include: (a) multi-age grouping over longer periods of time, (b) cross-age tutoring, (c) cooperative learning, (d) hands-on and student-centered activities; (e) use of block time and flexible scheduling; and (f) positive evaluations. Learning tasks are developmentally appropriate and adapted to individual differences (Ritzenthaler, 1993).

The experiential and cultural backgrounds of students are capitalized upon in effective learning experiences. Teachers who are adept in varying teaching and learning approaches actively engage students in hands-on activities such as experiments, demonstrations, and simulations. Further, numerous resources are consulted, offering instructional materials that reflect differing viewpoints (NMSA, 1995).

Effective middle school teachers present opportunities for students to choose the learning strategies in which they will participate and allow them to explore new ideas. When instruction is varied appropriately and used in conjunction with other recommended practices, middle level students have a better chance of succeeding academically (Brown, 1981; Carnegie, 1989; NMSA, 1995).

### Flexible Scheduling

The use of alternate scheduling patterns addresses the concern for more appropriate learning environments and the need for schools to be more creative in the use of time. Group size, the order of the periods, and the length of each period can vary. Flexible scheduling is a type of schedule in which the most recommended time practices for student achievement are incorporated in schools. This is a feature of exemplary schools that reallocates resources by optimizing time, space, and staff which facilitates varied curriculum offerings and teaching strategies. Flexible scheduling is a way of meeting the developmental needs of young adolescents (Canady & Rettig, 1995; Merenbloom, 1991; Spear, 1992).

The ultimate goal of any scheduling effort is a schedule that responds to as many needs as possible. Researchers advocate that teachers should be allowed to control the schedule and be more creative in making scheduling decisions due to their proximity to the students (Craig, 1995; Spear, 1992). Offering a choice of time configurations, flexible scheduling benefits both students and teachers. Teachers can improve their teaching strategies and have less stress factors, such as: (a) a lower number of students per day, (b) more quality time, (c) more in-depth exploration of topics, and (d) curricular integration. Blocks of time allow teachers, who are the best judge of time requirements for learning activities, to make choices and have more control over the learning environment (Canady & Rettig, 1995; Erb & Doda, 1989; Merenbloom, 1991).

When classes are taught in large blocks of time, students can benefit due to less fragmentation and more involvement in interdisciplinary activities. This organizational

pattern promotes skill application, interpersonal relations, and decision-making skills related to relevant problems (DeRouen, 1998; Vars, 1993). Studies indicate increased student engagement and achievement and positive social ramifications often result from longer periods of contact with the same adult (Arhar, 1992). Several options exist for flexible scheduling in the middle school, according to Spear (1992). They include: (a) instructional time for large groups, (b) one less period per day, (c) heterogeneous class grouping, and (d) top class team scheduling.

Most exemplary middle schools appear to use some form of flexible scheduling. In a survey of nominated exemplary middle schools, 75% of the respondents indicated that flexible scheduling was moderately to well developed at their schools (George & Shewey, 1994). Randomly sampled middle schools, however, show less implementation of flexible scheduling. In a national study, Valentine, Clark, Irvin, Keefe, & Melton (1993) found the majority of middle schools utilize seven instructional periods with 41 to 55 minutes per period.

Although most middle level educators recommend flexible scheduling, the current rate of implementation (about 20%) indicates there are common difficulties such as curriculum requirements and lunch periods. However, the benefits for students and teachers are reasons principals project a gradual increase in the use of flexible scheduling (Epstein & Mac Iver, 1990). McEwin, Dickinson, and Jenkins (1995) report a significant increase in the use of flexible scheduling within blocks for teams at all grade levels, particularly in schools with grades 6-8.

In determining what type of flexible schedule is appropriate for a middle school, several factors should be considered. According to Hackmann & Valentine (1998), the schedule should: (a) support interdisciplinary team organization, (b) support an appropriate curriculum, (c) support quality instruction in the disciplines through the expanded and flexible uses of time, (d) promote student development and supportive relationships, (e) promote quality teacher collaboration, and (f) promote teacher empowerment.

Basing a daily schedule on educational needs rather than standardized time periods and using varied organizational arrangements such as block scheduling, multi-age grouping, and alternate schedules are basic to the middle school concept (Fry, 1994). Researchers report that educators must remember that no one type of flexible schedule should be implemented in all middle schools. Rather, they report that teachers and administrators must be willing to openly examine the needs of their students as they explore all possible options (Hackmann & Valentine, 1998).

### Exploratory Programs

The exploratory program of a middle level school should offer students a structure in which they are provided opportunities to explore their talents, interests, and skills. Such programs have as their focus enabling students to define and pursue their needs in order to develop interests that will affect future school and life decisions (NASSP, 1993; Toepfer, 1997). Exploratory classes are offered in varying lengths, such as 4 1/2 weeks, 6 or 9 weeks, up to 18 weeks (Forte & Schurr, 1993).

Exploratory programs capitalize on the natural curiosity of young adolescents, exposing them to a range of academic, vocational, and recreational subjects for career options, community service, enrichment, and enjoyment. Exploratory topics include drama, environmental studies, keyboarding, yearbook, study skills, orchestra, speech, industrial technology, foreign languages, fine arts, careers, choir, computer literacy, crafts, business education, horticulture, family and consumer sciences, student government, creative writing, and several other special areas. Exploratory classes are an indispensable part of an effective middle school program. Students are better prepared to focus on a career path at the high school level when they explore a variety of subjects at the middle school level, they (Beane, 1990; Clark & Clark, 1993; Lounsbury, 1984; Ritzenthaler, 1993).

There is consensus as to characteristics of an exploratory program that is designed to meet the needs of adolescent students (Seghers, 1995). Such an exploratory program will include a series of courses or experiences that enable students to (a) gather information and strategies, (b) take risks without fear of failure, (c) use their bodies and minds to create both products and processes, (d) look at alternative ways of doing things, and (e) interact with peers in a productive non-threatening environment. A well-designed exploratory program will not be competitive in nature, but will be a safe time and place for students to explore individual talents and ideas as a member of a structured group. It will have teachers who understand the process of exploration and the needs of the students and will allow students to begin or continue to develop their own ideas and talents (Bergmann, 1992; Renzulli, 2000).



### Transition Programs

Transition programs focus on creating a smooth change of schools for the young adolescent. Eighty-eight percent of public school students begin the middle grades in a new school, a transition which may overwhelm the coping skills of some students and “have pathogenic effects on their psychological adjustment, self-esteem, and motivation to learn” (Mac Iver, 1990, p. 461). A common approach is for elementary school students to visit the middle level school they will be attending, while administrators of the elementary and middle level schools meet to discuss programs. Middle school counselors also discuss ways to help students make a smoother transition from elementary to middle school and from middle school to high school (McEwin, Dickinson, & Jenkins, 1995).

The National Middle School Association (1995), in emphasizing the importance of transition programs in its report This We Believe, stated, “Transescents, already highly sensitive and vulnerable because of the many changes they are experiencing personally, are especially likely to be upset by a shift from one school to another and should receive special consideration at the transition points” (p. 13). Further research has confirmed the importance of transition programs and suggests that middle schools place emphasis on comprehensive orientation procedures in order to assist students in becoming more knowledgeable about their school. This emphasis on the successful transition of students from one level to the next, when continued throughout the school year, has a more positive effect on students than a transition program that ends with the beginning of the school year (Siehl & Gentry, 1990).

The stresses caused by the transition from one school to another can be lessened if teachers and administrators in the new school are aware of and attend to the needs of the students. These students should receive assistance prior to, during, and after the move in order to minimize the social, psychological, and academic impact of the transition (Odegaard & Heath, 1992).

In the common middle school, there are several factors that often intimidate sixth-grade students as they make the transition from elementary school. Some of these factors include (a) organizational skills, (b) getting to class on time, (c) using hall lockers, and (d) remembering which class to go to next. Fortunately, schools can take measures to alleviate, or at least lessen, these concerns. Weldy (1995) suggested several guidelines for effective transition programs. Schools should provide several activities that will involve students, parents, teachers, and staff from both schools in the transition process. They should establish a transition protocol that can be easily replicated and updated annually with little effort while establishing a timeline for the transition process. Meetings should be scheduled between collaborative groups from sending and receiving schools and discussions held for adults and students about the issues. Additionally, the human and financial resources available to support the transition process should be assessed. Following the implementation of a transition program, students, teachers, guidance counselors, parents, and others should be asked to evaluate its effectiveness (Weldy, 1995).

The proper implementation of the middle school philosophy will mean a change in the way educators deliver educational services. This is, perhaps, more important than the components themselves (Worley, 1992).

### Research in Middle Level Education

Early research involving middle level education generally focused on characteristics of middle schools and junior high schools (George & Shewey, 1994). National and state studies were conducted to describe middle schools in terms of organizational patterns and programs (Alexander, 1968; Alexander & McEwin, 1989; Cawelti, 1988; Epstein & Mac Iver, 1990; George & Shewey, 1994; Ritzenthaler, 1993). Common elements or characteristics of middle schools developed as middle level practitioners refined the practices that supported the middle school concept (ERS, Inc., 1983; Johnson, 1984; Strahan, 1992). Researchers began to study middle school practices as they existed in relationship to other aspects of schools. Studies of middle schools' climates (Butler, 1983; Pettus, 1992; Sabo, 1993; Thomas, 1991) and teachers' and students' attitudes (Felner, Mulhall, Kasak, Mungo, Flowers, & Sartain, 1994; Pook, 1980; Watson, 1992) have increased the knowledge base of middle school as educational organizations.

Research activities involving middle school practices and student achievement are important to educational reformers. The results from initial studies to determine if middle schools improved student academic achievement were often in conflict (George & Shewey, 1994). George and Oldaker (1986) stated that a lack of consistency in middle school program evaluation led them to carry out their study. They concluded

that “middle school organization positively affects student achievement, personal development, learning climate, faculty morale, staff development, and parental and community involvement” (p. 79). Lee and Smith (1993) investigated the relationship of middle schools that have restructured to include elements of the middle school concept and student academic achievement and student academic involvement. The finding supported positive but modest effects on student academic achievement and with students’ engagement with schoolwork. The findings did not, however, determine any effects of middle school practices and at-risk behaviors (Lee & Smith, 1993).

Results from a five-year longitudinal study of middle schools that have implemented Turning Points (Carnegie, 1989) recommendations have recently been released (Felner, Jackson, Kasak, Mulhall, Brand, & Flowers, 1997; Mertens, Flowers, & Mulhall, 1998). The study explored (a) changes in students’ health, well-being, and socio-emotional functioning; (b) academic achievement and progress; and (c) experiences of the climate and functioning resulting from schools implementing the Turning Points recommendations. Data were collected from 73 schools which participated in the study, including over 34,000 students. The schools were given a “level of implementation” (LOI) rank of high, medium, or low based on how a school scored on the Carnegie Index of Middle School Transformation. Achievement scores were computed across all grades in a school. The authors pointed out that this provided a more conservative test than if the comparison were by grades and LOI. In comparing reading, mathematics, and language achievement scores, schools with a high LOI had higher scores than did middle LOI and low LOI schools. Teacher ratings of student

aggression and moodiness/shyness showed less prevalence in higher LOI schools than lower LOI rated schools (Felner et al., 1997). These findings were consistent with earlier studies regarding improved school climate and student health issues of schools with higher levels of middle school practices (Sabo, 1993; Thomas, 1991).

Teachers in the state of Georgia, responding to a survey conducted by Sexton (1999) indicated that the implementation of the middle school concept does have a positive effect on student achievement in vocabulary and reading. No statistically significant positive relationships could be established between the implementation of the middle school concept and math achievement.

Surveys of parents, students, teachers, and administrators in a Texas community, conducted by Hartin (1994), indicated that careful planning and attention to process and culture were necessary in order for schools to achieve the greatest results from the implementation of the middle school concept. A collaborative vision and values, communicated well to the entire school community, are essential for middle school success. This corresponds to the contention of Bolman and Deal (1991) that cultural values and symbolic structures must be transformed in order to improve schools. Most reform efforts have ignored the importance of the meaning and continuity provided by the cultural values of a school. School leaders must transform the basic character of schools. This transformation is accomplished by establishing a shared vision and communicating it effectively to all stakeholders of the school (Bolman & Deal, 1991).

Another equally important consideration in the implementation of the middle school concept is staff development. Teachers must be well-grounded in middle school

theory and practice as well as in shared decision-making in order to effect the most lasting and substantial change (Hartin, 1994; Uber, 1991).

Due to the fact that most middle school teachers do not hold specific middle school certification (McEwin, Dickinson, & Jenkins, 1995), understanding the developmental needs of young adolescents and the best strategies for teaching them will likely vary among faculty members. A needs analysis should be conducted in order to determine exactly what the staff development needs are prior to planning such training (Lunenburg & Ornstein, 1996).

In an investigation concerning the effect of the middle school concept on academic achievement and behavior, Clem (1996) concluded that during the first four years of implementation of the middle school concept, there was no significant difference in the academic achievement of students. Academic performance, however, did improve during the fifth year of implementation. It was believed that the movement of elementary teachers to the middle school, as well as more collaboration among teachers, and an advisory program may have all contributed to the increase in academic performance.

Clem (1996) also noted an increase in the number of suspensions in the middle schools of Orange County, Florida, during the five years of her study. It was not clear if this increase was related to the implementation of the middle school concept or the change in disciplinary policies that banned corporal punishment. Further, Clem (1996) discovered a significant decrease in the dropout rate of the middle schools studied. She contributed this decrease to the increase in student satisfaction toward teachers. Average

daily attendance of students also increased throughout the first five years of implementation of the middle school concept (Clem, 1996).

Studies have indicated that the longer the recommended Turning Points practices have been in effect, the more substantial are the improvements in middle schools. By implementing the Turning Points recommendations, schools run differently, and that affects student achievement (Erb, 2000). Research has indicated that schools, however, must also consider the students' experience when implementing middle level practices. In this way, academic growth and achievement will be enhanced (Russell, 1994). Such practices as advisory programs and enriched exploratories are successful only to the extent that the students' needs are served. Without considering the prior experiences of students, facilitating real-world connections is impossible (Anfara & Waks, 2000).

#### Application of Turning Points to Specific Middle Schools

Many examples exist of schools where students are making significantly higher academic achievement following the implementation of Turning Points recommendations. For example, Canton Middle School in Baltimore, Maryland began its journey toward middle school excellence in 1991. As the Maryland site for the Carnegie Corporation's Middle Grade School State Policy Initiative, Canton Middle School began by implementing a bottom-up change, as promoted in Turning Points (Spilman, 1995).

Principal Craig Spilman sought to genuinely involve teachers in every aspect of the school. He instituted a collaborative school-based management design that led to

full implementation of the teaming and advisory concepts. Teachers were empowered by the roles and responsibilities they were allowed to assume within the School Improvement Team. Interdisciplinary teams of teachers, with daily common planning time, were given responsibility for organizational decisions affecting their students. Additionally, control of curriculum and program development moved to an interdisciplinary team of teachers (Spilman, 1995).

The needs of high-risk students at Canton Middle School were addressed by the School Improvement Team. Approximately 78% of the students at Canton were considered at-risk. Further, the school's 800 students had a daily attendance average of only 79%. School personnel teamed with community partners to implement Carnegie Corporation's goal for school-based medical resources. Attendance began to increase almost immediately (Spilman, 1995).

With more students in attendance at Canton, teachers focused their efforts toward designing relevant, interdisciplinary lessons that would encourage participation. The advisory program was also designed with an emphasis on service learning and drop-out prevention. Clear goals, objectives, and activities were written to target specific learning outcomes. The teachers further realized that the curriculum needed to be flexible so that it could be adapted to meet the needs of Canton's student population. Teachers were given structured professional development to enable them to meet the needs of their students.

The Middle Grade School State Policy Initiative continues to provide resources, support, and technical assistance for school improvement to Canton Middle School. An



analysis of students' grades and standardized test scores indicate that the implementation of the Turning Points recommendations is working. Attendance averages have increased, test scores have risen, and the drop-out rate has decreased dramatically (Spilman, 1995).

San Francisco's Horace Mann Middle School is another school that has made tremendous gains in student achievement in a few years. Closed at one time by the federal courts because it was not meeting student needs, this school has drastically turned things around (Dismuke, 1993).

Horace Mann Middle School was able to achieve such an accomplishment by reorganizing its 600 students into heterogeneously grouped "families" or teams as recommended by Turning Points. Additionally, teams composed of one teacher for each core class--math, science, language arts, and social studies--were created and given flexibility through block scheduling. Regularly scheduled team meetings were held to enable teachers to collaborate more frequently about the needs of individual students and to plan interdisciplinary lessons (Dismuke, 1993).

Other components of the Carnegie Corporation's recommendations were implemented at Horace Mann Middle School, including advisory and a structured program for shared decision-making. Test scores have soared while attendance and discipline problems have decreased (Dismuke, 1993).

Another school that has experienced academic success following the implementation of the Turning Points recommendations is Barren County Middle

School in Glasgow, Kentucky. This rural school serves approximately 600 students in grades 7 and 8, with nearly one-half of the students qualifying for free or reduced-price lunch. Barren County Middle School was created by the merging of four junior high schools in 1994. It was the first middle school in the county (Lipsitz, 1999).

Students at Barren County Middle School are grouped heterogeneously and are placed on teams with five core teachers. Students also participate in an advisory period each day. Interdisciplinary teams of teachers have common planning periods daily during which they analyze student work and lessons to determine the best teaching strategies to utilize for high student achievement. Teachers are empowered to make decisions concerning student schedules. They also conduct parent conferences and have a high level of parental contact (Lipsitz, 1999).

Teachers at Barren County Middle School spend a great deal of time analyzing data about students' academic performance and behavior. This information is shared with other teachers and parents in order to meet the individual needs of students. Test scores have improved dramatically since the creation of Barren County Middle School. Teachers and school administrators give a lot of the credit to the components of Turning Points that they have implemented (Lipsitz, 1999).

### The Middle School in Louisiana

In response to the Carnegie Commission's Turning Points (1989), the Louisiana Department of Education brought together its own panel of middle level experts. The result of this commission was the publication of Turning Points for Louisiana: A Blueprint for Quality Middle Schools (LMGAC, 1989). In the preface to this document,

Louisiana Superintendent of Education, Dr. Wilmer Cody, stated that Louisiana was committed to meeting the distinctive needs of 10 to 15 year-olds by providing a specialized middle school program.

Goals were established that addressed the relationship of the students to the teachers and the practices evident in the school. The goals implored every middle school student in the state of Louisiana to:

- succeed every day at something in school either in academics, physical education, arts, or exploratory areas,
- have access to a qualified adult in the school who will make a special effort to promote student success and will assist individuals to solve problems and adjust to the school and to the world,
- experience a carefully planned program of academic fundamentals in the areas of reading, English, mathematics, science, and social studies,
- experience a carefully planned program of exploratory offerings (music, art, home living, industrial arts, introduction to computers, etc.) and physical education activities, and
- experience the joy of selecting and exploring a broad variety of activities without the fear of failure. (LMGAC, 1989, p. 2 )

It was thought that by meeting these goals, many of the problems facing the state—high school drop-outs, drug abuse, and teen-age pregnancies--would be solved.

Twenty-nine recommendations, based on the previous recommendations of Carnegie's Turning Points, were made by the diverse group of educators known as the Louisiana Middle Grades Advisory Council. These recommendations were expected to be implemented, with full funding from the state, by August 1991. The recommendations included the following:

1. Recognize the separateness of the middle level experience by establishing a Bureau of Middle Level Schools in the Department of Education and establishing separate criteria for school accreditation.
2. Implement the interdisciplinary team structure with designated team leaders facilitated by state funding at a 20/1 pupil teacher ratio and a 200/1 pupil/lead teacher ratio.
3. Implement advisor/advisee programs within each team which follow sound principles of guidance.
4. Require a seven or optional eight-period day, to allow for enrichment/exploratory courses.
5. Provide a team planning period and an individual planning period for each teacher assigned to a team.
6. Provide options for the use of large blocks of time for interdisciplinary and unit teaching using flexible time period requirements for each subject except physical education.
7. Require a daily health and physical education period with emphasis on physical fitness, well-being, lifetime sports, and intramural sports.
8. Enable building level governance committees freedom to design programs to meet the diverse needs of the student populations by providing more flexibility in state mandated requirements in the enrichment/exploratory course area without compromising instruction in the core curriculum or conflicting with necessary student services.
9. Extend the school day and/or the school year to provide flexibility in scheduling specialized instruction or to expand learning opportunities in the arts, enrichment, and tutorial programs. All students should have the opportunity to participate without paying fees.
10. Replace ability grouping/tracking of students with methods that effectively teach students of diverse ability and with different rates and styles of learning.
11. Create multiple types of teaching arrangements in order to respond to individual student needs, teacher preferences, and requirements of specific courses.
12. Award no Carnegie units at the middle level.

13. Include computer literacy in the middle level curriculum without the requirement of a Carnegie unit.
14. Teach young adolescents to think critically, be active citizens, and learn as well as test successfully. Expect success from each student.
15. Provide an attractive, clean, cheerful, healthy school environment by the renovation or redesigning of school plants.
16. Enhance the enrichment and exploratory curricula by the wide use of community resources.
17. Give teachers greater influence in the classroom and make available adequate resources in the form of books, materials, supplies, and space for that teacher.
18. Focus on friendly, intramural competitions, service-oriented projects, and organization which can foster a sense of self-worth for all types of personalities.
19. Communicate effectively with the families of all students: families of various ethnic backgrounds and races, one-parent and two-parent families, families undergoing internal stress, economic hardship, and families with various other problems that may surface.
20. Staff middle level schools with teachers who are expert at teaching young adolescents, who have specially prepared for assignment to grades five through eight, are up-to-date concerning course content and curriculum, and who have a minimum of twelve semester hours of college credit in at least two fields of study appropriate to the middle grades.
21. Provide, through the State Department of Education, in-service education for middle level teachers in academic content, interpersonal skills, and pedagogical theory and practice uniquely suited to the middle grades.
22. Develop an information and support system through the State Department of Education to disseminate research, best practices and emerging practices related to the learner, curriculum, effective teaching, instruction, school climate, and school organization. This should include print, video, interactive videodisc, teleconferencing, and a computer network.

23. Provide access to health services directly by funding a 450/1 pupil/school nurse ratio and indirectly by supporting access to community health services for all middle level students.
24. Provide counseling services by certified staff members at a 300/1 pupil/counselor ratio.
25. Support school-community agencies that will work with parent groups and parent education to enhance parents' understanding of the development of their children, the specific needs of their children, and the stresses faced by their children in their daily lives.
26. Provide access to peers trained to be mentors for students of the same or different ages.
27. Provide access to a group guidance program involving counselors, teachers, and students in planned activities designed to develop appropriate academic and behavioral values.
28. Engage families in the educational process by frequent communication, parent-teacher conferences planned to accommodate the work schedules of the parents, recruiting parent volunteers on a regular schedule, initiating parent workshops, providing a parent resource center, recognizing and rewarding parent volunteers, initiating contact with parents of students in the elementary schools for orientation, forming parent-teacher-student-business-school partnerships, and involving an active Parent-Teacher-Student Association.
29. Connect schools with their communities by bringing business and community people into the school governance process. Schools and community groups should plan to share sponsorship of academic, cultural arts, and athletic events in any way appropriate for that community using financial, personnel, and other resources. (LMGAC, 1989, p. 24-26)

Although these recommendations were widely accepted throughout the state over a decade ago, studies have shown that Louisiana's middle schools and schools serving sixth or seventh grade students have still not fully implemented these practices. These same studies concluded that these practices are positively related to

academic achievement and negatively to the proportion of suspensions, expulsions, and teacher turnover (Seghers, 1995; Seghers, Kirby, & Meza, 1997).

Current State Superintendent of Education, Mr. Cecil Picard, has placed emphasis on the middle grades in his plans to improve education in Louisiana (Harvison, 1998). A task force was convened to re-examine the 1989 recommendations for middle schools improvement. Although several changes were made to the prior blueprint for quality schools, a continuing consensus for the recommendations made in Turning Points (Carnegie, 1989) more than a decade earlier was indicated (LMSIC, 1998). The 29 recommendations made in the 1989 version of Turning Points for Louisiana: A Blueprint for Quality Middle Schools were reduced to the following 11 recommendations:

1. Recognize the separateness of the middle level experience and to provide a support system dedicated to middle level education by the State Department of Education.
2. Lower the student/teacher ratio.
3. Implement the interdisciplinary team structure with designated team leaders empowered to make decisions.
4. Implement a schedule which allows for enrichment/exploratory courses and for each teacher assigned to a team, a team planning period and an individual planning period.
5. Implement an advisory program.
6. Provide a daily health and physical education period with emphasis on physical fitness, wellness, lifetime sports, and intramural sports.
7. Provide options for the use of large blocks of time for interdisciplinary and unit teaching.

8. Encourage multiple types of teaching strategies with the infusion of instructional technology across all subject areas along with the use of various assessments.
9. Staff middle level schools with teachers who are prepared to teach young adolescents.
10. Provide staff development specifically designed for middle level educators.
11. Connect schools with their communities by bringing business and community people into the schools to support and enhance the educational process. (LMSIC, 1998, p. 19)

In spite of recommendations made in both versions of Turning Points for Louisiana, the Louisiana Department of Education still does not have a separate department for middle level education (LDE, 2000b). This is really not unique to Louisiana, as Neighbors (1998) found that Alabama has no designated middle school specialists in the State Department of Education. This researcher contacted the Department of Education in all 50 states to determine how pervasive this practice was. Of the 27 states that responded to the request, none had a separate division for middle schools. North Carolina, for example, has an Instructional Services Division that consists of subject sections (L. Morgan, personal communication, November 28, 2000). South Carolina does not have a separate middle school division but does have a middle school specialist (V. Bruce, personal communication, November 26, 2000). The Vermont Department of Education formed a task force, funded by the Carnegie Corporation, to study issues surrounding middle grades education. However, when the grant expired, so did the middle grades reform efforts (D. Chiappetta, personal communication, November 28, 2000).



Perhaps more important is the lack of a systematic network for middle level educators to share resources and support (Adams, 1993; Southern Forum to Accelerate Middle Grades Reform, 2000). In its report of state activities, the Southern Forum representatives from Louisiana, Glenda Sue Perkins and Ruthie Smith-Stevenson, stated the sentiment expressed by the members from most states, namely that the State Department of Education does not value the importance of emphasizing middle level education (Southern Forum to Accelerate Middle Grades Reform, 2000).

Turning Points for Louisiana (Louisiana Middle Grades Advisory Committee, 1989) defined the middle school as follows:

The middle school, when operationally effective, provides a program that meets the needs of early adolescent (transescent) students in the in-between years, usually ages ten through fourteen, in grades six through eight. The middle school is an educational response to the needs and characteristics of transescents during these turbulent years and, as such, deals with their full range of intellectual and affective developmental needs. The middle school is unique. It differs from both the elementary and secondary school and attempts to provide a secure bridge between these two phases of schooling. (p. v)

The Louisiana Department of Education currently classifies middle schools jointly with junior high schools. They are defined as, “any school whose grade structure falls within the 4-9 range, that includes grades 7 and/or 8, and that excludes grades in the PK-3 and 10-12 ranges” (LDE, 2000a, p. iii). This definition makes no mention of the intellectual or developmental needs unique to middle school students but rather categorizes middle schools based on the grades contained therein. This method of classifying schools is not unique to Louisiana. All 50 states rely on grade configurations alone in defining middle schools (Digest of Education Statistics, 1999). Previous

research has recommended the development of standardized criteria for classifying middle schools and junior high schools (Worley, 1992).

Given the definition presently used by the Louisiana Department of Education, schools with many different grade configurations must be examined in order to include all schools containing middle grades. According to the 1999-2000 School Performance Scores released by the Louisiana Department of Education, schools listed in the middle schools category were found in 8 different grade configurations (See Table1). There were 244 schools classified as middle schools, although their names often did not contain the word middle (LDE, 2000c).

The Louisiana accountability program "Reaching for Results" classified schools as either elementary, middle, high, or combination. School Performance Scores were calculated to indicate the level of performance of students and schools. These scores utilized the accountability indicators of the LEAP21 criterion-referenced test (CRT), the norm-referenced Iowa Tests (NRT), student attendance rate, and student dropout rate to summarize the performance of the school's students. The average School Performance Score of middle schools for the 1998-99 school year, 64.9, was the lowest of any type school in the state. School Performance Scores are calculated by multiplying each index score (CRT, NRT, attendance, and dropout) by the specified weights, then rounding to the nearest tenth (0.1) of a point. The norm-referenced ITBS is 30% of the score, criterion-referenced LEAP21 is 60% of the score, attendance rate is 5%, and dropout rate is 5% (LDE, 1999).

Additionally, nearly two thirds of eighth grade students in Louisiana scored below the basic level on the math portion of the 1996 National Assessment of Educational Progress (Cooney, 1998). This poor performance indicates a need to determine to what extent the recommendations of Turning Points (Carnegie, 1989) have been implemented in the middle schools of Louisiana.

Several groups have begun to focus their attention on middle level education in Louisiana. In addition to the Louisiana Middle Schools Association, the Southern Regional Education Board, the Foundation for the Mid-South, and the Southern Forum to Accelerate Middle Grades Reform are all investigating the effectiveness of middle level schools and looking for ways to help middle schools be successful (Cooney, 1999; Foundation for the Mid-South, 2000; Southern Forum to Accelerate Middle Grades Reform, 2000).

The Southern Regional Educational Board has made recommendations that states and school districts should implement in order to improve the achievement of middle grades' students. These recommendations include the following:

1. States should review content standards in grades five through eight to ensure that they clearly and completely spell out the essential content knowledge, skills and applications to be achieved at each grade level. Content and performance standards must state precisely what is expected so that students, families and teachers understand the criteria for promotion and success at the next level.
2. States should examine the level of performance required at the end of eighth grade and compare it with the standard for "proficient" performance on the National Assessment of Educational Progress to ensure that all students enter high school ready to succeed in curricula that prepare them for further learning and the workplace.

3. States should provide useful examples and a framework for core curricula that will be challenging and will meet state standards for content and student performance.
4. States should align assessments to content standards and define performance levels needed at the end of eighth grade to place students on a path that will meet graduation requirements in high school.
5. States should report the percentages of students who meet performance levels in a way that informs districts and schools about which indicators of readiness are best and which teaching practices improve eighth-graders' academic achievement.
6. States should require a teaching license specific to the middle grades with a content major or a content minor (or its equivalent) that includes upper-level college courses. The license should be linked to state standards for learning.
7. Middle grades licensure should require classroom experiences in schools with students in grades five through eight.
8. Districts and schools should employ only teachers who have at least the equivalent of a content minor in the subject or subjects they are to teach and who have school experience with young adolescents.
9. States should enact a policy that requires all teachers in the middle grades to obtain a content minor or its equivalent in the subject or subjects they teach within five years in order to renew their licenses.
10. Districts and schools should provide professional development that is linked to student performance on state and local standards and is directed toward improving content knowledge and teaching practices.
11. States should outline clearly a vision of comprehensive improvement in the middle grades that will increase the percentages of students who perform at state standards.
12. State departments of education should assign personnel to be responsible for efforts to improve student achievement in the middle grades.
13. States should examine the level of resources available for middle grades education to ensure that academic gains made in the early grades are sustained in grades five through eight. (Cooney, 1999, p. 1)

Van Zandt & Totten (1995) stated that in order to positively establish the best practices to be utilized in middle schools so that student performance can be optimized while developmental needs are met, studies such as those previously mentioned are necessary.

Debate is on-going concerning the quality of teachers at the middle level. The Southern Regional Education Board and the National Middle School Association have conducted studies to determine the amount and kind of preparation teacher candidates undergo before teaching in the middle level. Both groups concluded that many middle school teachers are not properly prepared to teach young adolescents. Recommendations were made that a license specific to grades five through eight be added by the states and that middle school teachers receive more content-specific coursework (Cooney, 1999; NMSA, 1991).

Valentine and Mogar (1992) reported that 33 states had specialized middle level teacher certification, up from 15 in 1978. The licensure regulations in many states allow teachers to overlap their certification, enabling them to teach in the middle school as well as either elementary or high school (Valentine & Mogar, 1992).

Five recommendations were made by the National Middle School Association concerning the essential elements of a middle level teacher education program (NMSA, 1991). These recommendations included study in the following: (a) developmental needs of young adolescents; (b) middle school concept, including teaming, advisory, and exploratory; (c) concentration in at least two academic areas; (d) methods and reading courses; and (e) field experiences throughout their program of study.

The Board of Regents and the Board of Elementary and Secondary Education in Louisiana formed a Blue Ribbon Commission on Teacher Quality in 1999 with a goal of improving teacher performance. The Commission is comprised of 31 members from public and private colleges and universities, teachers, administrators, representatives from the legislature and governor's office, state superintendent of education, and members of the sponsoring boards. The Blue Ribbon Commission was given the task of recommending policies to the governor that would lead to a cohesive PK-16+ system, designed to increase student achievement of K-12 students (LDE, 2001).

Four major recommendations arose from the meetings of the Blue Ribbon Commission. These included the following: (a) creation of coordinated partnerships, (b) recruitment of teacher candidates and certified teachers, (c) preparation of quality teachers, and (d) creation of essential conditions and environments. One suggestion was made that state agencies, universities, and districts should work collaboratively to prepare teachers with an in-depth core knowledge and teaching skills to effectively educate higher achieving K-12 students (LDE, 2001).

The Commission further recommended the change of the certification structure for teachers, making it more specific regarding grade levels. Focus is also placed on more in-depth content knowledge. The four new focus areas of certification would be as follows: (a) Preschool to Grade 2; (b) Grades 1-6; (c) Grades 4-8; and (d) Grades 7-12. The recommendations of the Blue Ribbon Commission are subject to approval by several state agencies before implementation is mandated in the state (LDE, 2001).

Eleven years after the publication of Turning Points: Preparing Youth for the 21st Century, Jackson and Davis (2000) examined and analyzed the progress made in middle schools since that time and published Turning Points 2000: Educating Adolescents in the 21st Century. Whereas the original Turning Points (1989) established organizational structures such as teaming, flexible scheduling, and advisory programs, Turning Points 2000 focused on curriculum, assessment, and instruction. Turning Points 2000 offered seven recommendations for successful middle level schools, as compared to the eight recommendations made in the original publication (Jackson & Davis, 2000). These new recommendations include the following:

- Teach a curriculum grounded in rigorous, public academic standards for what students should know and be able to do, relevant to the concerns of adolescents and based on how students learn best. . . .
- Use instructional methods designed to prepare all students to achieve higher standards and become lifelong learners. . . .
- Staff middle grades schools with teachers who are expert at teaching young adolescents, and engage teachers in ongoing, targeted professional development opportunities. . . .
- Organize relationships for learning to create a climate of intellectual development and a caring community of shared educational purpose. . . .
- Govern democratically, through direct or representative participation by all school staff members, the adults who know the students best. . . .
- Provide a safe and healthy school environment as part of improving academic performance and developing caring and ethical citizens. . . .
- Involve parents and communities in supporting student learning and healthy development. (Jackson & Davis, 2000, p. 23-24)

Five crucial changes were made in the recommendations from the first Turning Points to the latter. First, ensuring success for all students is the pervasive goal of Turning Points 2000, not merely a recommendation. Second, teaching and learning take prominence in the list of recommendations due to the belief that teaching and learning should drive changes in the total school program. Third, the terminology used to describe what should be taught has been changed to reflect the emphasis on standards. Fourth, the original recommendation of teaching a core of common knowledge has been divided into two separate recommendations including the teaching of a standards-based curriculum, and the use of instructional methods that are designed to enable all students to achieve higher standards. Finally, two of the original recommendations have been combined into one that focuses on the connection between families and communities. The recommendations of Turning Points 2000 are intended to be utilized systemically in order to ensure success (Jackson & Davis, 2000).

Middle schools began initiating structural changes following the release of the original Turning Points, usually one at a time, thus indicating the seriousness of the intent to reform. Such structural alterations do impact middle level education. However, without a focus on improved student learning, this impact is limited. Further, schools often implemented only one or a few of the recommendations of the original Turning Points (Jackson & Davis, 2000). Preliminary research has shown that the impact on student achievement is greater when schools take a holistic approach toward implementing the Turning Points (1989) recommendations (Felner et al., 1997). By



combining the recommendations of Turning Points and Turning Points 2000, middle level schools will be designed to ensure success for all students (Davis & Jackson, 2000).

## CHAPTER III

### METHODOLOGY AND PROCEDURES

#### Research Design

The plan and format utilized by the researcher to secure evidence answered the following research questions: (1) What are the perceptions of principals as to the degree of implementation of the Carnegie (1989) recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total score on the MLPQ? and (2) Is the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total score of the MLPQ related to desirable student and school-based outcomes?

Crowl (1996) defined survey research as “research that describes how different variables are distributed throughout a population” (p. 432). The two basic kinds of surveys are cross-sectional and longitudinal (Crowl, 1996). This study utilized the cross-sectional survey design, involving middle school principals.

The researcher replicated the work conducted by Seghers (1995), with minor variations. Whereas Seghers included all public schools in Louisiana that serve sixth and/or seventh grade students, this study focused only on schools designated as middle level by the Louisiana Department of Education. The Middle Level Practices

Questionnaire (MLPQ), developed by Seghers (1995), was designed to assess the perceived level of implementation of the Carnegie recommendations for middle school improvement in Louisiana and to determine whether a relationship exists between the perceived level of implementation of these recommendations and desirable educational outcomes.

The goal of this researcher was to distribute the questionnaire to principals of all 244 schools that were identified, for school accountability purposes, as middle schools by the Louisiana Department of Education. Four superintendents did not grant permission for schools in their districts to participate, with time constraints of principals given as the primary reason. Thus, a total of thirty-two middle schools were not included in the study. The distribution of the MLPQ was completed in March of 2001 to 212 principals in 58 districts. Several follow-up attempts were made by phone calls and facsimiles until 66% of the participants (139) had responded. This was completed by the middle of April. Data analysis was concluded by the beginning of May 2001.

### Sample

A purposeful sample (Wiersma, 1991) was selected in order to obtain persons who could provide information about the topic of research. As mentioned previously, the sample included principals of schools labeled as middle schools by the Louisiana Department of Education for the purposes of accountability. There were 244 school principals included in this sample. However, the number of principals actually included in the purposeful sample was 212, as determined by the consent of school district superintendents.

The study focused on schools that serve students in the middle grades. The principals chosen for the population in this study were those from schools with configurations listed in Table 1 which indicates each of the grade configurations among Louisiana public schools that fall within the middle school category (LDE, 2000c).

Table 1

Louisiana Middle Schools by Grade Configuration, 1999-2000

Grade Structure	Number of Schools	Percent of Sample
6-8	124	50.8
7-8	45	18.4
5-8	37	15.2
7-9	16	6.6
4-8	13	5.3
4-7	5	2.1
5-7	2	.8
6-9	2	.8
Totals	244	100.0

Instrumentation

According to Crowl (1996), questionnaires are frequently used in survey research when the sample size is relatively large. The Middle Level Practices Questionnaire (MLPQ), developed by Seghers, who was contacted and who gave his consent for use in this study, is the instrument that was used in this study (see

Appendixes A and B). The MLPQ, which was used to measure the level of implementation of the Carnegie recommendations, consists of 36 questions divided into eight subscales based on a factor analysis conducted by Seghers (1995) that regrouped the eight Carnegie (1989) recommendations into empirically supported subscales. Participants responded to each item by ranking it according to a 5-point Likert scale (see Appendix C). A subscore for each of the subscales as well as an overall score for the MLPQ was calculated.

The MLPQ was developed in four phases (Seghers, 1995). First, survey items were constructed based on current literature, recommendations for further research from Clark & Clark (1990), and questions used in a national study by Epstein and Mac Iver (1990). A global statement was developed to correspond to each of the eight goals in the Carnegie (1989) report. In order to assess the construct validity of the MLPQ, scores on the global statements were correlated with subscale scores. The following methods were utilized to determine if sub-scale scores would be appropriate:

1. Internal consistency of the eight apriori subscales was assessed using Cronbach's (1982) alpha ( $p < .05$ ).
2. Subscales were correlated with their global items with a statistically significant correlation expected ( $p < .05$ ).
3. Principal Components Factor Analysis was used to determine the unique factors among the middle level practices assessed. (Seghers, 1995, p. 220)

It was found that the MLPQ items did not group empirically with the eight Carnegie (1989) goals. In addition, low to moderate correlations were found between the MLPQ global items and the apriori subscales. Therefore, the MLPQ items were reorganized into subscales that are related both empirically and logically. Seghers

(1995) categorized the eight global statements as follows: (a) curriculum and instruction, (b) governance and decision-making, (c) parental involvement, (d) variety of learning opportunities, (e) commitment to young adolescents, (f) safety and resources, (g) health promotion, and (h) ability grouping (See Appendix D).

The next phase of MLPQ development involved a panel of experts contributing to the appraisal of face validity and item revision. Three professors of education, who were familiar with the framework of the study, comprised this panel. If two of the three experts thought that an item should be removed from the pilot test, it was eliminated (Seghers, 1995). "The quality of a test is usually judged by its reliability and validity, two properties that characterize all tests" (Crowl, 1996, p. 101). To be valid, the scores of a test must allow the researcher to draw meaningful inferences. If a test conducts measurements consistently, it is considered reliable. Validity is more important than reliability, but more difficult to determine (Crowl, 1996).

The third phase of MLPQ development was to determine reliability. This was done through a pilot test administered to 14 non-public school principals, serving sixth and seventh grade students, in Louisiana. These participants also responded to questions concerning the structure and clarity of the MLPQ (Seghers, 1995). Four questions in the pilot test had standard deviations of less than .5. These items were revised using recommendations from the expert panelists. The overall reliability of the MLPQ was considered acceptable because the coefficient alpha (Cronbach, 1951) of .77 in the pilot study exceeded the minimum recommended value of .70 (Nunnally, 1978; Seghers, 1995).

Finally, reliability was appraised and construct validity determined based on a field test of the revised scale (Seghers, 1995). The field test involved 154 middle school principals in Louisiana. The overall reliability of the MLPQ in the field study was .85, which is acceptable. The suggestions of the pilot test participants also contributed to revisions (Seghers, 1995).

The MLPQ is an instrument that has been tested and deemed acceptable to measure the level of implementation in relation to Turning Points (Carnegie, 1989). This instrument helps to clarify the recommendations that can be used in assessing the level of implementation (Seghers, 1995).

### Definitions

The variables were defined operationally as follows:

1. Average Daily Attendance - The average of the percentage of students who are present at school on a daily basis for the year (LDE, 1999).
2. Dependent Variable – Also known as the consequent variable or a measure of the output side of the input-output relationship. It is also the measure being predicted or criterion variable (Sprinthall, 1994).
3. Expulsion Rate - The percent of students removed from school for a determined number of days with no provision of instructional services (LDE, 2000a).
4. Grade Configuration – The grades that are contained within a school constitute its grade configuration (LDE, 1999).
5. Independent Variable – The measure from which the prediction will be made in correlational research (Sprinthall, 1994).

6. Iowa Test of Basic Skills (ITBS) - The Iowa Test of Basic Skills (ITBS) is a norm-referenced test consisting of 13 sub-tests in the subject areas of reading, language, mathematics, social studies, sciences, and sources of information. Student scores are reported as percentiles which indicate how a student scored in relation to the norming group (LDE, 2000a).

7. LEAP for the 21st Century (LEAP21) – A criterion-referenced test given annually to students in grades 4 and 8. The tests are designed to measure a student's mastery of the content standards in English/Language Arts, Mathematics, Science and Social Studies (LDE, 2000a).

8. School Setting – The types of communities the Louisiana Department of Education uses to designate school settings, including rural, small town, large town, or city (LDE, 2000c).

9. Socioeconomic Status (SES) – The SES index is a composite of five equally weighted components: family income, father's occupation, father's and mother's education levels, and household items (Digest of Education Statistics, 1999).

10. Suspension Rate – The percent of students who are temporarily prohibited from participating in their usual placement within school with no provision of instructional service (LDE, 2000a, p. 3-9).

11. Teacher Turnover Rate – The percent of teachers who leave a school due to reasons other than retirement or death (Seghers, 1995).



### Procedure

Following approval from the Human Use Committee at Louisiana Tech University, a letter was sent in March 2001 to 62 school district superintendents in the state of Louisiana. This letter requested consent to survey the principals in their districts (see Appendix E). Superintendents of the four remaining school districts in the state were not contacted due to there being no schools in those districts classified as middle level by the State Department of Education. Approval was received from 58 superintendents. Immediately upon receipt of approval from superintendents, the MLPQ was sent to principals. A cover letter was included, detailing the study and its possible impact on the future of middle schools in Louisiana (see Appendix F). A pre-addressed, first-class postage paid return envelope was included in the mailing.

Each MLPQ was individually numbered and assigned to each of the 212 schools so that follow-up phone call reminders or facsimiles could be sent only to those not responding to previous mailings. The identification numbers were printed on the bottom of the first page of the MLPQ in the lower left corner.

Approximately two weeks after the MLPQ was mailed, a follow-up fax was sent to all principals who had not responded. The importance of their participation was stressed. Additionally, a postcard was sent to thank principals who had already returned their questionnaires.

Due to low response, approximately a week later, a follow-up phone call was made to those principals who still had not returned their questionnaires. A second copy

of the MLPQ was sent to principals who had misplaced or thrown away the original. Once again, a pre-addressed, first-class postage paid envelope was included.

### Data

For Research Question One, the categorical data of grade configuration and school setting was secured from the School Performance Score Report for each participating school (LDE, 2000c) and verified by the information reported in the demographic section of the MLPQ. The grade configuration for each school was one of those shown in Table 1. School setting was listed as one of the following: (a) rural, (b) small town, (c) large town, or (d) city.

Data regarding SES were obtained from the School Performance Score Report for each school, verified by the MLPQ responses, and reported as a percentage. The SES was divided into four ranges, namely, 0-25%, 26-50%, 51-75%, and 76-100%.

For Research Question Two the independent, or predictor, variable was the perceived level of implementation of the middle school concept in each school. It was based on the individual perceptions of principals as measured by the MLPQ. The MLPQ scores are reported for each of the eight subscales and the overall composite.

There were six dependent, or criterion, variables for Research Question Two. They are as follows: (a) ITBS composite score, (b) LEAP21 index score, (c) student attendance rate, (d) student suspension rate, (e) student expulsion rate, and (g) teacher turnover rate. Student attendance rate, suspension rate, expulsion rate, and teacher turnover rate were reported as percentages based on information obtained from the

MLPQ and school accountability reports. ITBS and LEAP21 index scores were obtained from the School Report Card of each participating school.

### Data Analysis

In order to answer the following research questions and test the null hypotheses, the scores of respondents were subjected to statistical analysis utilizing the Statistical Package for the Social Sciences (Norusis, 1990). Analysis of Variance (ANOVA) and multiple stepwise regression were used to analyze the data related to the hypotheses. A one-way ANOVA was used to determine statistically significant differences among three or more sample means (Spatz and Johnston, 1989). ANOVA was used to determine if there were significant differences in the level of implementation (8 subscales and overall MLPQ score) by grade configuration, school setting, and SES. ANOVA was also “used in regression analysis to determine if variables are significantly correlated” (Crowl, 1996, p. 426).

If the results from the ANOVA were not significantly different, then no further statistical analysis was necessary. However, if significance was indicated by the ANOVA, a post hoc test was conducted (Crowl, 1996). A post hoc comparison determined exactly which group means were different from which other group means (Schumacher & McMillan, 1993).

Witte and Witte (1997) gave two assumptions of the populations when using ANOVA for statistical analysis: “All underlying populations are assumed to be normally distributed with equal variances” (p. 362), and all samples must be fairly large (greater than about 10). Therefore, only the schools that were categorized within the

grade configurations of 6-8, 7-8, 5-8, 7-9, and 4-8 were used to test the first hypothesis associated with Research Question One.

Multiple regression was used to analyze the relationship between the eight subscale scores and the overall scores on the MLPQ and the six variables. Crowl (1996) described multiple regression as a “statistical procedure for predicting values of one variable on the basis of two or more other variables” (p. 429). In stepwise regression analysis, the variables named are examined at each step for entry or removal until none remain that meet the removal criteria (Norusis, 1990). For Research Question Two, perceived implementation of the Carnegie recommendations comprised the predictor variable. ITBS index score, LEAP21 index score, student attendance rate, student suspension rate, student expulsion rate, and teacher turnover rate were the criterion variables.

More specifically, the data were analyzed as follows:

Research Question (1): What are the perceptions of principals as to the degree of implementation of the Carnegie (1989) recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total score on the MLPQ?

Null Hypothesis (1a): There are no significant differences in the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total score of the MLPQ by grade configuration.

Null Hypothesis (1b): There are no significant differences between school setting (rural, small town, large town, or city) and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ.

Null Hypothesis (1c): There are no significant differences between socioeconomic status (SES) and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ.

Research Question (2): Is the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total score of the MLPQ related to desirable student and school-based outcomes?

Null Hypothesis (2a): There is no significant relationship between school index scores on the Iowa Test of Basic Skills (ITBS) and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ.

Null Hypothesis (2b): There is no significant relationship between school index scores on the LEAP for the 21st Century (LEAP21) and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate

sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ.

Null Hypothesis (2c): There is no significant relationship between student attendance and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ.

Null Hypothesis (2d): There is no significant relationship between the percent of suspensions and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ.

Null Hypothesis (2e): There is no significant relationship between the percent of student expulsions and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ.

Null Hypothesis (2f): There is no significant relationship between the rate of teacher turnover and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ.

The level of significance has been defined by Spatz and Johnston (1989) as the “cutoff point that separates ‘due to chance’ from ‘not due to chance’” (p. 147). Three conventional levels of significance that are commonly used are: .05, .01, and .001 (Popham, 1993). In educational research, according to Wiersma (1991), .05 and .01 are

the most commonly used levels of significance. Spatz and Johnston (1989) stated that the .05 level of significance is generally accepted. A predetermined level of significance of .05 was utilized in this study.

## CHAPTER IV

### ANALYSIS OF DATA

#### Introduction

Presented in this chapter are the results of the statistical analysis of the data collected for this study. There were two purposes of this study. First, the study ascertained, according to middle school principals, the extent to which the Carnegie (1989) recommendations for middle school improvement have been implemented in the public schools of Louisiana that serve students in grades six, seven, and eight. These recommendations include: (a) creating small communities for learning, (b) teaching a core of common knowledge, (c) ensuring success for all students, (d) empowering teachers and administrators, (e) preparing teachers in the middle grades, (f) improving academic performance through better health and fitness, (g) re-engaging families in the education of young adolescents, and (h) connecting schools with communities. The second purpose was to determine if the perceived level of implementation of the Carnegie recommendations has a positive effect on student achievement.

Descriptive statistics were used to summarize data regarding the sample. Additionally, the findings related to both of the major research questions are discussed in this chapter. The first research question considers the perceptions of



principals as to the degree of implementation of the Carnegie (1989) recommendations in Louisiana schools that contain sixth, seventh, or eighth grade students as measured by the eight subscales and overall total score on the Middle Level Practices Questionnaire (MLPQ). A discussion of the research findings of sub-hypotheses ( $H_{1a}$ - $H_{1c}$ ) for this research question focuses on the relationship among the level of implementation of the Carnegie recommendations by grade configuration, school setting, and socioeconomic status (SES).

The conclusion to the chapter is the analyses related to the second major research question that focuses on the relationship between the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total score of the MLPQ and desirable student and school-based outcomes. A discussion of the research findings of sub-hypotheses ( $H_{2a}$ - $H_{2f}$ ) centers on the relationship among the degree of implementation of the Carnegie recommendations and (a) Iowa Test of Basic Skills (ITBS) scores, (b) Louisiana Educational Assessment Program (LEAP21) scores, (c) student attendance, (d) suspensions, (e) expulsions, and (f) teacher turnover.

### Sample

The Louisiana Department of Education identified 244 schools as middle schools for the purposes of its accountability program (LDE, 2000c). Copies of the MLPQ were distributed to principals of 212 of these identified schools after permission to participate in the survey was granted by respective district superintendents. The school was the unit of study.

A total of 139 usable surveys were returned for a return rate of 66%. Of the surveys returned, 69 (49%) were from 6-8 organized schools; 26 (19%) were from 7-8 organized schools; 26 (19%) were from 5-8 organized schools; 8 (6%) were from 7-9 organized schools; 7 (5%) were from 4-8 organized schools; 2 (1%) were from 4-7 organized schools; and 1 (1%) was from a 6-9 organized school. The data in Table 2 give the percentage of responses by grade configuration. Of the schools in the sample, 36 are classified as rural, 29 as small town, 39 as large town, and 35 as city. Also, the mean for SES as measured by the percentage of students in the schools in the sample who were currently on free or reduced price lunch was reported as 77.99.

Table 2

MLPO Responses by Grade Configuration

Grade Configuration	Surveys Sent	Surveys Returned	Percent Returned
6-8	109	69	63
7-8	34	26	76
5-8	36	26	72
7-9	16	8	50
4-8	9	7	78
4-7	5	2	40
5-7	1	0	0
6-9	2	1	50
Totals	212	139	66

A further analysis of the returned questionnaires indicated that 35% were from school districts in the northern part of the state and that 65% were from the southern part of the state. The return rate for the northern part of the state was slightly higher than the 28% of Louisiana middle schools located in that area of the state. Of the 58 school districts surveyed, responses were received from at least one of the middle schools in 57 of them. All surveys were returned from 28 school districts (see Appendixes G and H).

### Descriptive Statistics

#### Assuring the Accuracy of the Data

Several questionnaires were received with incomplete or illegible responses. Attempts were made to contact the principals who had returned these questionnaires in order to ascertain the correct responses. It was not possible, however, to secure all missing data prior to conducting statistical analysis. Therefore, the total number of responses varied among tests conducted.

The demographic data indicated on the MLPQ (i.e., enrollment, grade configuration, number of teachers) were compared to the demographic data listed in the 1999-2000 Louisiana School Directory (LDE, 2000b). The comparison of the data supported the accuracy of the MLPQ demographic information.

## Hypothesis Testing

### Research Question One

Research Question One focused on the perceptions of principals as to the level of implementation of the MLPQ middle level practices. Sub-hypotheses involved tests of the difference in the perceived level of implementation by grade configuration, SES, and school setting (rural, small town, large town, and city). Analysis of Variance (ANOVA) was conducted for grade configuration, SES, and school setting. All results were analyzed using a one-way ANOVA, between groups design. The first analysis revealed a significant difference in one of the subscales due to grade configuration. The second analysis revealed a significant difference in two of the subscales due to setting. The third analysis revealed no significant difference due to SES.

H<sub>1a</sub>. Null Hypothesis (1a) stated that there are no significant differences in the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total score of the MLPQ by grade configuration. Due to missing data, only 135 schools were included in the grade configuration analysis. In this sub-hypothesis, grade configuration was the independent, or predictor, variable. The perceived level of implementation of the Carnegie (1989) recommendations was the dependent variable.

The perceived level of implementation was affected by grade configuration in one of the eight subscales. Table 3 displays the one-way ANOVA on all eight subscales and on the total MLPQ score. A significant difference ( $p < .05$ ) was found between groups by grade configuration on the Health Promotion subscale (SS7). There was no

Table 3

Analysis of Variance on Perceived Level of Implementation  
of MLPQ Middle Level Practices by Grade Configuration

Source	SS	df	MS	F
SS1:				
Between Ss	15.27	4	3.82	.75
Within Ss	662.62	130	5.10	
SS2:				
Between Ss	37.94	4	9.49	.47
Within Ss	2601.00	130	20.01	
SS3:				
Between Ss	23.94	4	5.98	.56
Within Ss	1399.00	130	10.76	
SS4:				
Between Ss	23.61	4	5.90	.48
Within Ss	1591.83	130	12.25	
SS5:				
Between Ss	36.20	4	9.05	2.42
Within Ss	485.46	130	3.73	
SS6:				
Between Ss	4.76	4	1.19	.75
Within Ss	207.25	130	1.59	
SS7:				
Between Ss	7.42	4	1.85	2.53*
Within Ss	95.44	130	.73	
SS8:				
Between Ss	4.91	4	1.23	.98
Within Ss	162.42	130	1.25	
Total Scale:				
Between Ss	65.30	4	16.32	.08
Within Ss	26760.41	130	205.85	

\* $p < .05$

significant difference found between groups on subscales Curriculum and Instruction (SS1), Governance and Decision-Making (SS2), Parental Involvement (SS3), Variety of

Learning Opportunities (SS4), Commitment to Young Adolescents (SS5), Safety and Resources (SS6), and Ability Grouping (SS8) (see Appendix D).

Due to the significant difference found on the Health Promotion subscale (SS7), a Duncan post hoc test was conducted to determine exactly which other group means of the five groups were significantly different from other group means (i.e., 6-8, 7-8, 5-8, 7-9, and 4-8). The results of the Duncan post hoc test indicated a significant difference among the means of schools with (a) grades 4-8 and those with grades 6-8; (b) grades 4-8 and those with grades 5-8; and (c) grades 4-8 and those with grades 7-9 within the Health Promotion subscale (SS7) of the MLPQ. The null hypothesis was rejected. The mean scores for all eight subscales and the total score by each group are presented in Table 4.

H<sub>1b</sub>. Null Hypothesis (1b) stated that there are no significant differences between school setting (rural, small town, large town, or city) and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ. The one-way ANOVA on all eight subscales and the total MLPQ score by school setting is summarized in Table 5.

In this sub-hypothesis, school setting was the independent, or predictor, variable. The perceived level of implementation of the Carnegie (1989) recommendations was the dependent variable. A significant difference ( $p < .05$ ) between the smallest and largest means was found between groups by school setting on the Governance and Decision-Making subscale (SS2) and on the Safety and Resources subscale (SS6).

Table 4

**MLPO Implementation Mean Scores and Group Differences  
by Grade Configuration N=135**

GROUPS CONFIGURATION	1 (6-8)	2 (7-8)	3 (5-8)	4 (7-9)	5 (4-8)
SS1: Curriculum and Instruction	14.66	14.65	14.88	14.50	16.14
SS2: Governance and Decision-Making	10.22	8.96	9.81	10.88	9.71
SS3: Parental Involvement	26.71	25.77	25.96	26.38	25.71
SS4: Variety of Learning Opportunities	16.57	17.35	16.65	17.50	15.71
SS5: Commitment to Young Adolescents	11.44	12.08	10.73	10.88	10.14
SS6: Safety and Resources	12.91	13.35	13.04	12.75	12.71
SS7: Health Promotion	8.15 5*	8.50	8.31 5*	7.88 5*	9.00 1,3,4*
SS8: Ability Grouping	2.28	2.00	2.00	1.63	1.86
Total Score:	136.50	137.38	136.69	135.00	134.57

\*Groups that differed significantly ( $p < .05$ ) on Duncan post hoc tests

There was no significant difference found between groups by school setting on subscales Curriculum and Instruction (SS1), Parental Involvement (SS3), Variety of

Learning Opportunities (SS4), Commitment to Young Adolescents (SS5), Health Promotion (SS7), and Ability Grouping (SS8).

Table 5

Analysis of Variance on Perceived Level of Implementation of MLPO Middle Level Practices by School Setting

Source	SS	df	MS	F
SS1:				
Between Ss	33.33	3	11.11	2.29
Within Ss	654.36	135	4.85	
SS2:				
Between Ss	112.17	3	54.72	2.93*
Within Ss	2525.50	135	18.71	
SS3:				
Between Ss	43.49	3	14.50	1.34
Within Ss	1461.62	135	10.83	
SS4:				
Between Ss	37.34	3	12.45	1.04
Within Ss	1614.18	135	11.96	
SS5:				
Between Ss	.83	3	.28	.07
Within Ss	528.90	135	3.92	
SS6:				
Between Ss	14.00	3	4.67	3.13*
Within Ss	200.99	135	1.49	
SS7:				
Between Ss	3.40	3	1.13	1.44
Within Ss	106.28	135	.79	
SS8:				
Between Ss	3.83	3	1.28	1.04
Within Ss	165.56	135	1.23	
Total Scale:				
Between Ss	244.01	3	81.34	.39
Within Ss	28060.59	135	207.86	

\*  $p < .05$



A Duncan post hoc test was conducted to determine exactly which other group means differed significantly (i.e., rural, small town, large town, city). On the Governance and Decision-Making subscale (SS2), small town schools differed significantly from city schools and from rural schools. A significant difference was shown between group means on the Safety and Resources subscale (SS6) for large town schools and rural schools as well as large and small town schools. The null hypothesis was rejected. Table 6 shows the mean scores for all eight subscales and the total score for each group.

H<sub>1c</sub>. Null Hypothesis (1c) stated that there are no significant differences between socioeconomic status (SES) and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ. Table 7 displays the one-way ANOVA on all eight subscales and on the total MLPQ score by SES. In this sub-hypothesis, SES was the independent, or predictor, variable. The perceived level of implementation of the Carnegie (1989) recommendations was the dependent variable. No significant difference was found between groups by SES on the subscales Curriculum and Instruction (SS1), Governance and Decision-Making (SS2), Parental Involvement (SS3), Variety of Learning Opportunities (SS4), Commitment to Young Adolescents (SS5), Safety and Resources (SS6), Health Promotion (SS7), and Ability Grouping (SS8). Since the ANOVA did not indicate any significant difference between groups by SES, no further tests were conducted. The study failed to reject

the null hypothesis. Table 8 shows the mean scores for all eight subscales and the total score for each group.

Table 6

**MLPO Implementation Mean Scores and Group Differences**  
**by School Setting N=139**

GROUPS SETTING	1 Rural	2 Small Town	3 Large Town	4 City
SS1: Curriculum and Instruction	15.14	14.48	15.23	14.06
SS2: Governance and Decision-Making	10.92 2*	8.07 1,4*	9.49	10.71 2*
SS3: Parental Involvement	25.44	26.66	26.41	26.91
SS4: Variety of Learning Opportunities	17.47	15.97	16.87	16.66
SS5: Commitment to Young Adolescents	11.31	11.31	11.31	11.49
SS6: Safety and Resources	12.75 3*	12.66 3*	13.46 1,2*	13.00
SS7: Health Promotion	8.22	8.38	8.38	8.00
SS8: Ability Grouping	2.36	1.90	2.10	2.03
Total Score:	137.39	134.21	137.69	136.03

\*Groups that differed significantly ( $p < .05$ ) on Duncan post hoc tests

Table 7

Analysis of Variance on Perceived Level of Implementation  
of MLPO Middle Level Practices by SES

Source	SS	df	MS	F
SS1:				
Between Ss	6.23	4	1.58	.31
Within Ss	681.40	134	5.09	
SS2:				
Between Ss	86.84	4	21.71	1.12
Within Ss	2602.83	134	19.42	
SS3:				
Between Ss	10.43	4	2.61	.23
Within Ss	1494.68	134	11.15	
SS4:				
Between Ss	24.66	4	6.17	.51
Within Ss	1626.86	134	12.14	
SS5:				
Between Ss	15.87	4	3.97	1.04
Within Ss	513.85	134	3.84	
SS6:				
Between Ss	1.59	4	.40	.25
Within Ss	213.41	134	1.59	
SS7:				
Between Ss	2.18	4	.55	.68
Within Ss	107.50	134	.80	
SS8:				
Between Ss	4.01	4	1.00	.81
Within Ss	165.37	134	1.23	
Total Scale:				
Between Ss	722.82	4	180.70	.88
Within Ss	27581.79	134	205.83	

\*  $p < .05$

Research Question Two

Research Question Two focused on the relationship between the perceptions of principals as to the level of implementation of the Carnegie recommendations and

Table 8

**MLPO Implementation Mean Scores by SES N=139**

<b>GROUPS (SES)</b>	<b>1 0-25%</b>	<b>2 26-50%</b>	<b>3 51-75%</b>	<b>4 76-100%</b>
<b>SS1: Curriculum and Instruction</b>	14.86	15.00	14.82	14.47
<b>SS2: Governance and Decision-Making</b>	9.29	11.11	9.12	9.82
<b>SS3: Parental Involvement</b>	26.43	26.67	26.06	26.31
<b>SS4: Variety of Learning Opportunities</b>	17.29	17.17	16.39	16.73
<b>SS5: Commitment to Young Adolescents</b>	11.43	11.72	10.92	11.49
<b>SS6: Safety and Resources</b>	13.14	13.14	12.88	12.98
<b>SS7: Health Promotion</b>	8.29	8.33	8.33	8.07
<b>SS8: Ability Grouping</b>	2.29	2.06	2.31	1.91
<b>Total Score:</b>	137.71	139.69	134.31	135.76

desirable student and school outcomes. The hypothesis for this question states that the perceived level of implementation is a significant positive predictor of these educational outcomes. Sub-hypotheses were analyzed using stepwise multiple regression in order to determine the effect of the implementation of the Carnegie recommendations and the

ITBS scores, LEAP21 scores, student attendance, suspensions, expulsions, and teacher turnover.

H<sub>2a</sub>. Null Hypothesis (2a) stated that there is no significant relationship between school index scores on the (ITBS) and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ. Statistical analyses were conducted for the effect of the perceived level of implementation as measured by the eight subscales and the total MLPQ to the Spring 2000 sixth and seventh grade ITBS. The school ITBS accountability index scores were used. The independent, or predictor, variable was the perceived level of implementation of the middle school concept. The dependent, or criterion, variables were the ITBS index scores.

The correlation analysis indicated a positive significant relationship between the Ability Grouping subscale (SS8) and the ITBS index scores. Table 9 shows the correlations among the subscales and the ITBS index scores.

A stepwise regression analysis was conducted, with the results shown in Table 10. The stepwise regression analysis began with all of the eight subscale scores—Curriculum and Instruction (SS1), Governance and Decision-Making (SS2), Parental Involvement (SS3), Variety of Learning Opportunities (SS4), Commitment to Young Adolescents (SS5), Safety and Resources (SS6), Health Promotion (SS7), and Ability Grouping (SS8). Results indicated that a significant relationship existed within the Ability Grouping subscale (SS8) for the effect of MLPQ implementation on ITBS index

Table 9

Correlations Among the MLPQ Subscales and ITBS Index Scores

Predictor	r
SS1: Curriculum and Instruction	.15
SS2: Governance and Decision-Making	-.04
SS3: Parental Involvement	-.02
SS4: Variety of Learning Opportunities	.07
SS5: Commitment to Young Adolescents	.10
SS6: Safety and Resources	.04
SS7: Health Promotion	.12
SS8: Ability Grouping	.18*
Total Score:	.08

\* $p < .05$ 

scores. The Adjusted  $R^2$  was .027 which suggests that SS8 accounted for approximately 3% of the variances in the ITBS index scores. Therefore, the Ability Grouping subscale (SS8) should be left in the model based on the significance of that particular variable. All of the other seven variables—SS1, SS2, SS3, SS4, SS5, SS6, and SS7—were excluded. The null hypothesis was rejected.

Table 10

ANOVA for Stepwise Multiple Regression for Variables Predicting ITBS Index Scores  
N=139

<u>MODEL</u>	<u>SS</u>	<u>df</u>	<u>MS</u>	<u>F</u>
Regression	3390.09	1	3390.09	4.77*
Residual	97420.58	137	711.10	
Total	100810.67	138		

\*  $p < .05$

Note.  $\hat{Y} = 4.47X_1 + 62.03$ ; Where  $X_1 = SS8$

H<sub>2b</sub>. The Null Hypothesis (2b) stated that there is no significant relationship between school index scores on the LEAP21 and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ. Statistical analyses were conducted for the effect of the perceived level of implementation as measured by the eight subscales and the total MLPQ to the Spring 2000 eighth grade LEAP21 scores. The independent, or predictor, variable was the perceived level of implementation of the middle school concept. The dependent, or criterion, variable was the LEAP21 index score. The school LEAP21 accountability index scores were used.

The correlation analysis indicated a positive relationship between the Ability Grouping subscale (SS8) and the LEAP21 index scores. Table 11 shows the correlations among the subscales and the LEAP21 index scores.

Table 11

**Correlations Among the MLPO Subscales and LEAP21 Index Scores**

Predictor	r
SS1: Curriculum and Instruction	.16
SS2: Governance and Decision-Making	-.06
SS3: Parental Involvement	-.01
SS4: Variety of Learning Opportunities	.04
SS5: Commitment to Young Adolescents	.09
SS6: Safety and Resources	.01
SS7: Health Promotion	.12
SS8: Ability Grouping	.17*
Total Score:	.06

\*p &lt; .05

A stepwise regression analysis was conducted as shown in Table 12. The stepwise regression analysis began with all of the eight subscale scores—Curriculum and Instruction (SS1), Governance and Decision-Making (SS2), Parental Involvement (SS3), Variety of Learning Opportunities (SS4), Commitment to Young Adolescents



(SS5), Safety and Resources (SS6), Health Promotion (SS7), and Ability Grouping (SS8). Results indicated that the Ability Grouping subscale (SS8) should be left in the model based on the significance of that particular variable. The Adjusted  $R^2$  was .021 which suggests that SS8 accounted for approximately 2% of the variances in the LEAP21 index scores. All of the other seven variables—SS1, SS2, SS3, SS4, SS5, SS6, and SS7—were excluded. The null hypothesis was rejected.

Table 12

ANOVA for Stepwise Multiple Regression for Variables Predicting LEAP21 Index Scores N=139

<u>MODEL</u>	<u>SS</u>	<u>df</u>	<u>MS</u>	<u>F</u>
Regression	1655.05	1	1655.05	4.00*
Residual	56664.94	137	413.61	
Total	58319.98	138		

\*  $p < .05$

Note.  $\hat{Y} = 3.16X_1 + 62.23$ ; Where  $X_1 = SS8$

H<sub>2c</sub>. The Null Hypothesis (2c) stated that there is no significant relationship between student attendance and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ. Statistical analyses were conducted for the effect of the perceived level of implementation as measured by the eight subscales and the total MLPQ to student attendance. The independent, or predictor, variable was the perceived level of implementation of the middle

school concept. The dependent, or criterion, variables were the student attendance rates for each school. No significant relationship was found between the MLPQ and student attendance as shown in the correlations in Table 13.

Table 13

Correlations Among the MLPQ Subscales and Student Attendance

Predictor	r
SS1: Curriculum and Instruction	.06
SS2: Governance and Decision-Making	-.02
SS3: Parental Involvement	.02
SS4: Variety of Learning Opportunities	.03
SS5: Commitment to Young Adolescents	.07
SS6: Safety and Resources	.08
SS7: Health Promotion	.04
SS8: Ability Grouping	.03
Total Score:	.06

\* $p < .05$

Regression analysis for the effect of the perceived level of implementation as measured by the eight subscales and the total MLPQ score was conducted and also revealed no significant relationship on student attendance. No independent variables were found to be significant predictors of the dependent variable, student attendance. Since there were no significant relationships indicated, no other regression analysis was needed. The study failed to reject the null hypothesis.

H<sub>2d</sub> The Null Hypothesis (2d) stated that there is no significant relationship between the percent of suspensions and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ. Statistical analyses were conducted to determine the effect of the perceived level of implementation as measured by the eight subscales and the total MLPQ to student suspensions. The independent, or predictor, variable was the perceived level of implementation of the middle school concept. The dependent, or criterion, variables were the number of student suspensions for each school. No significant relationship was found between the MLPQ and student suspensions as shown in the correlations in Table 14. The study failed to reject the null hypothesis.

H<sub>2e</sub> The Null Hypothesis (2e) stated that there is no significant relationship between the percent of student expulsions and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ. Statistical analyses were conducted to determine the effect of the perceived level of

Table 14

Correlations Among the MLPQ Subscales and Suspensions

Predictor	r
SS1: Curriculum and Instruction	-.11
SS2: Governance and Decision-Making	.14
SS3: Parental Involvement	.07
SS4: Variety of Learning Opportunities	.03
SS5: Commitment to Young Adolescents	-.08
SS6: Safety and Resources	.08
SS7: Health Promotion	-.04
SS8: Ability Grouping	.05
Total Score:	.01

implementation as measured by the eight subscales and the total MLPQ to student expulsions. The independent, or predictor, variable was the perceived level of implementation of the middle school concept. The dependent, or criterion, variable was the student expulsion rate for each school. The correlation analysis indicated a significant relationship between the Governance and Decision-Making subscale (SS2)

and student expulsions. Table 15 shows the correlations among the subscales and student expulsions.

Table 15

Correlations Among the MLPO Subscales and Expulsions

Predictor	r
SS1: Curriculum and Instruction	-.03
SS2: Governance and Decision-Making	.18*
SS3: Parental Involvement	.04
SS4: Variety of Learning Opportunities	-.04
SS5: Commitment to Young Adolescents	.11
SS6: Safety and Resources	.09
SS7: Health Promotion	.07
SS8: Ability Grouping	-.11
Total Score:	.05

\*  $p < .05$

A stepwise regression analysis was conducted as shown in Table 16. The stepwise regression analysis began with all of the eight subscale scores—Curriculum

and Instruction (SS1), Governance and Decision-Making (SS2), Parental Involvement (SS3), Variety of Learning Opportunities (SS4), Commitment to Young Adolescents (SS5), Safety and Resources (SS6), Health Promotion (SS7), and Ability Grouping (SS8). Results indicated that the Governance and Decision-Making subscale (SS2) should be left in the model based on the significance of that particular variable. The Adjusted  $R^2$  was .025 which suggests that SS2 accounted for approximately 2 1/2 percent of the variances in student expulsions. All of the other seven variables—SS1, SS3, SS4, SS5, SS6, SS7, and SS8—were excluded. The null hypothesis was rejected.

Table 16

ANOVA for Stepwise Multiple Regression for Variables Predicting Student Expulsions  
N=139

<u>MODEL</u>	<u>SS</u>	<u>df</u>	<u>MS</u>	<u>F</u>
Regression	336.70	1	336.70	4.49*
Residual	10275.25	137	75.00	
Total	10611.96	138		

\*  $p < .05$

Note.  $\hat{Y} = .354X_1 + 2.932$ ; Where  $X_1 = SS2$

H<sub>2f</sub> The Null Hypothesis (2f) stated that there is no significant relationship between the rate of teacher turnover and the perceived level of implementation of the Carnegie recommendations in Louisiana schools that educate sixth, seventh, or eighth graders as measured by the 8 subscales and overall total scores of the MLPQ. Statistical analyses were conducted to determine the effect of the perceived level of

implementation as measured by the eight subscales and the total MLPQ to the rate of teacher turnover. The independent, or predictor, variable was the perceived level of implementation of the middle school concept. The dependent, or criterion, variable was the teacher turnover rate for each school. The correlation analysis indicated a significant negative relationship between the Curriculum and Instruction subscale (SS1) and Health Promotion subscale (SS7) to teacher turnover. Table 17 shows the correlations among the subscales and teacher turnover.

A stepwise regression analysis was conducted as shown in Table 18. The stepwise regression analysis began with all of the eight subscale scores—Curriculum and Instruction (SS1), Governance and Decision-Making (SS2), Parental Involvement (SS3), Variety of Learning Opportunities (SS4), Commitment to Young Adolescents (SS5), Safety and Resources (SS6), Health Promotion (SS7), and Ability Grouping (SS8). Results indicated that the Health Promotion subscale (SS7) should be left in the model based on the significance of that particular variable. The Adjusted  $R^2$  was .038 which suggests that SS7 accounted for approximately 4% of the variance in student expulsions. All of the other seven variables—SS1, SS2, SS3, SS4, SS5, SS6, and SS8—were excluded. The null hypothesis was rejected.

Table 17

Correlations Among the MLPO Subscales and Teacher Turnover

Predictor	r
SS1: Curriculum and Instruction	-.20*
SS2: Governance and Decision-Making	.10
SS3: Parental Involvement	.00
SS4: Variety of Learning Opportunities	-.15
SS5: Commitment to Young Adolescents	-.07
SS6: Safety and Resources	-.08
SS7: Health Promotion	-.21*
SS8: Ability Grouping	-.13
Total Score:	-.09

\*  $p < .05$



Table 18

ANOVA for Stepwise Multiple Regression for Variables Predicting Teacher Turnover  
N=139

<u>MODEL</u>	<u>SS</u>	<u>df</u>	<u>MS</u>	<u>F</u>
Regression	454.91	1	454.91	6.47**
Residual	9630.29	137	70.29	
Total	10085.19	138		

\*\*  $p < .01$

Note.  $\hat{Y} = 2.037 X_1 + 28.63$ ; Where  $X_1 = SS7$

As has been demonstrated in this chapter, relationships between the MLPQ and school outcome variables were weak. This is similar to the findings of Seghers (1995). However, these were statistically significant for effects of MLPQ implementation on some aspects of school and student outcomes. Of particular note, however, is that the Curriculum and Instruction subscale (SS1) was found by Seghers to be significantly related to educational outcomes. The finding was not supported by this research. The Governance and Decision-Making subscale (SS2) was a significant predictor of school and student outcomes in this study but not in that of Seghers. The implications of these, as well as other findings, presented in this chapter are discussed in Chapter V.

## CHAPTER V

### SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

#### Introduction

In order to assess the perceived level of implementation of the Carnegie (1989) recommendations for middle school improvement in Louisiana middle schools and to ascertain whether the implementation of these recommendations leads to desirable student and school outcomes, the Middle Level Practices Questionnaire (MLPQ) was sent to 212 principals of public schools in Louisiana that educate sixth, seventh, and eighth grade students. Responses were received from 139 principals. The statistical results were reported in Chapter IV. The results and their implications for middle level schools will be discussed in this chapter.

Conclusions drawn from the statistical findings for Research Question One, focusing on the perceptions of principals as to the level of implementation of the Carnegie (1989) recommendations and for Research Question Two, concerning the relationship of implementation of the Carnegie (1989) recommendations to desirable student and school outcomes, will comprise the second section of this chapter. The third section of the chapter will contain implications for practice, followed by recommendations for further research.

### Conclusions

Research Question One sought to determine the perceptions of principals as to the level of implementation of the Carnegie (1989) recommendations, recognized by many as the components of the middle school concept (Lounsbury, 1992). It was necessary to determine to what extent these recommendations were perceived to have been implemented in the public middle level schools of Louisiana before ascertaining the relationship to desirable student and school outcomes. Although research shows that much progress has been made on the national level in the implementation of the middle school concept (George & Shewey, 1994), the results of this study concerning middle level schools in Louisiana indicated that little progress has been made in this area.

In examining the demographics of middle level schools, the data show that there are few significant differences in the perceived level of implementation of the Carnegie (1989) recommendations in Louisiana schools that educate sixth, seventh, or eighth graders. Using grade configuration as the independent variable, the only significant difference found by the Analysis of Variance (ANOVA) was on the Health Promotion subscale (SS7) of the MLPQ. Analyses with an ANOVA, followed by the Duncan post hoc test indicated significant differences between the means of schools with (a) grades 4-8 and those with grades 6-8; (b) grades 4-8 and those with grade 5-8; and (c) grades 4-8 and those with grades 7-9 (see Tables 3 and 4). Null Hypothesis (1a) was rejected based on these statistical analyses which indicated that there was a significant difference in the perceived level of implementation of the Carnegie (1989) recommendations due to grade configuration, although those differences were weak.

It has been widely accepted that the middle level school, containing grades 5-8 or grades 6-8, was established as the best organizational pattern to meet the needs of young adolescent students (George & Alexander, 1993). The results of this study did not uphold that belief in Louisiana. Grade configuration had an impact on the perceived level of implementation of the Carnegie (1989) recommendations only in the area of Health Promotion (SS7). This is discouraging to reformers who have reorganized middle level schools into specific grade configurations based on previous research indicating a higher level of implementation of the middle school concept.

School setting had more impact on the perceived level of implementation in that both the Governance and Decision-Making subscale (SS2) and Safety and Resources subscale (SS6) of the MLPQ showed significant differences. The ANOVA and Duncan post hoc tests indicated a significant difference on the Safety and Resources subscale (SS6) and significant differences on the Governance and Decision-Making subscale (SS2).

Small town schools and city schools differed significantly on the Governance and Decision-Making subscale (SS2) due to school setting. There was also a significant difference between the small town schools and rural schools. Further examination of the findings based on school setting would lead to logical conclusions. A significant difference exists between small town schools and both city and rural schools in the area of governance and decision-making. Several factors could contribute to this difference. For example, schools in rural areas are often extremely small and staffed with educators who know each other well. Teachers in these schools may have an

informal governance system without realizing it. On the other hand, as school settings get larger (cities), teachers may be more removed from decision-making and school governance due to the size of the staff. Schools in small towns could differ from both of these settings in that a structured governance and decision-making system would be in order, but not to the extent that it would be needed in larger city schools.

A significant difference was revealed on the Safety and Resources subscale (SS6) for large town schools and rural schools as well as large and small town schools due to school setting (See Tables 5 and 6). The three questions of the MLPQ related to SS6 focused on community services and resources. Large towns and rural areas differ greatly in the services and resources they provide. Similarly, schools in these settings differ in this respect. Null Hypothesis (1b) was rejected based on the statistical analyses which indicated that there was a significant difference in the perceived level of implementation of the Carnegie (1989) recommendations due to school setting.

Data showed that there was no significant difference indicated in the perceived level of implementation due to SES of students in the middle level school (see Table 7). The study, therefore, failed to reject Null Hypothesis (1c) since there was no significant difference in the perceived level of implementation due to SES. This finding corroborates that of previous research (Seghers, 1995).

This lack of a significant difference could also be attributed to the fact that Louisiana has an over-all high poverty level, resulting in a low SES for a large percentage of its students. With a mean of 77.99 for students receiving free or reduced price lunches in participating schools, there was a lack of variance in the SES variable.

Therefore, the SES would have less impact on the perceived level of implementation of the Carnegie (1989) recommendations than other factors. This result could also be based on the instrument used in this research. A significant difference might be found if a different instrument were utilized.

These findings indicate that Louisiana middle level schools have still not fully implemented the Carnegie (1989) recommendations. Additionally, school demographics of grade configuration, school setting, and SES do not make an over-all significant difference in the perceived level of implementation of these recommendations.

Research Question Two sought to determine the relationship between the implementation of the Carnegie (1989) recommendations and desirable student and school outcomes. Previous research (Seghers, 1995) has shown a significant correlation between the Curriculum and Instruction subscale (SS1) of the MLPQ and standardized student assessments. However, this research did not find significance in this area, although it was close to being statistically significant as a predictor to LEAP21 index scores. Rather, Ability Grouping (SS8) had a significant relationship to both ITBS index scores and LEAP21 index scores (See Tables 10 and 12). Thus, there is a relationship, be it small, between academic achievement and ability grouping in middle schools.

The significant relationship between the perceived level of implementation of the ability grouping practices and ITBS and LEAP21 index scores may indicate a change from previous research conducted by Seghers (1995). These findings, however, are similar to those of Lipsitz (1999) involving Barren County Middle School in

Kentucky. This signifies a change in recent years in the beliefs of teachers and principals concerning the abilities of all children to learn. Heterogeneous grouping practices have become more prevalent in the middle level schools of Louisiana in the last six years due, in part, to research and in-service training devoted to multiple teaching strategies (LMSIC, 1998). Some educators have learned to successfully teach to individual differences in students rather than to homogeneous groups.

Examination of the data concerning school outcomes of student attendance and suspensions revealed no significant relationship between the perceived level of implementation of the Carnegie (1989) recommendations and student attendance or suspensions. It did, however, indicate that Governance and Decision-Making (SS2) is significantly related to student expulsions (see Tables 13, 14, and 15). Previous research in Louisiana (Seghers, 1995) indicated a significant relationship between the Curriculum and Instruction subscale (SS1) and these outcomes. These findings, however, were not found in this study.

The significant relationship between the Governance and Decision-Making subscale (SS2) of the MLPQ and student expulsions can be attributed to school climate. As teachers become empowered by sharing in school governance and decision-making processes, school climate usually improves. These findings are similar to those at Canton Middle School in Baltimore, Maryland (Spilman, 1995). With a school climate that is conducive to meeting the needs of students, a no-nonsense attitude in dealing with students who insist on being disruptive may exist. In schools where teaming has been implemented, teams of teachers may utilize several disciplinary steps before

referring a student to the administrative disciplinarian. Therefore, the expulsion rate may increase for students who have been referred to an administrator.

The last area of this study sought to determine if a significant relationship exists between teacher turnover and the perceived level of implementation of the Carnegie (1989) recommendations. Regression analysis revealed a significant negative relationship between the Curriculum and Instruction subscale (SS1) and the Health Promotion subscale (SS7) of the MLPQ and teacher turnover. Stepwise regression, however, showed a significant relationship only between health promotion and teacher turnover (see Tables 17 and 18).

These findings indicate that the promotion of healthful lifestyles to students has an affect on preventing teachers from leaving a school. The promotion of healthful lifestyles to students has an affect on the attitudes that teachers possess about their own lives, and is a factor when making career decisions such as changing schools or leaving the teaching profession.

Based on the findings of this research, the study failed to reject Null Hypotheses (2c) and (2d) as there was no significant relationship between the perceived level of implementation of the Carnegie (1989) recommendations and student attendance or student suspensions. Null Hypotheses (2a), (2b), (2e), and (2f) were rejected since significant relationships exist between the perceived level of implementation of the Carnegie (1989) recommendations and ITBS index scores, LEAP21 index scores, student expulsions, and teacher turnover.



### Implications for Practice

It is important to remember the limitations that were mentioned in Chapter 1 when analyzing the findings of the study. Surveying only public middle schools in Louisiana may limit the generalizability of the results. Private and parochial schools in Louisiana or schools in other states might have different results entirely. The use of a self-perception inventory in the study makes the results dependent on the thoughts and attitudes of principals.

An examination of the perceptions of principals as to the level of implementation of the Carnegie (1989) recommendations for middle level schools in Louisiana revealed an alarmingly low statistic. Twelve years after the initial release of Turning Points and the adoption of this publication as a guide to improving middle level schools in Louisiana, much work remains to be done.

The Louisiana Department of Education requires new principals and assistant principals to participate in a two-year internship designed to increase their effectiveness as administrators. Based on the findings of this study, more emphasis needs to be placed on proven strategies to improve specific areas (i.e., elementary, middle, high school) rather than general administrative issues. Principals that have not had training in the theory and implementation of the Carnegie (1989) recommendations for middle level schools may be resistant to make such changes (Hartin, 1994).

Principals sometimes experience difficulty in implementing the components of the middle school concept due to the demands that are placed upon them in others areas.

The nature of the principalship often requires principals to spend much of their time engaged in activities that have little to do with transforming their schools into those that are designed to meet the developmental needs of young adolescents (Erb, 2000). Higher level administrators should consider restructuring and realigning job responsibilities so that principals will have the time and resources to accomplish the implementation of the Carnegie (1989) recommendations successfully.

Equipping principals to implement the components of the middle school concept in their schools will not necessarily translate into improved student and school outcomes. Teachers must also be trained to meet the developmental needs of young adolescents. The Blue Ribbon Commission on Teacher Quality (LDE, 2001) has made recommendations that, when implemented, will address this concern by establishing a specific certification for teachers in the middle grades. A specialized certification for middle level teachers, however, may not be the answer. Most students enrolled in teacher education programs elect to specialize in either the elementary or high school level. Requiring specialized certification will possibly cause a severe shortage of middle level teachers. Perhaps, a better alternative would be to provide all teachers with training in the developmental needs of young adolescents (McEwin, Dickinson, & Jenkins, 1995). This would allow for teachers to continue to certify in elementary or secondary grades, overlapping the middle level grades, yet giving them a background in the needs of young adolescents in case they decide to teach in those grades.

It has been established that successful implementation of components of the middle school concept such as interdisciplinary teaming, advisory program, and exploratory courses require a significant commitment from everyone involved (Hartin, 1994; Uber, 1991). The implementation of these and other components of the middle school concept would possibly be higher if there was a higher level of support from central office staff. Reorganizing a school into interdisciplinary teams without adequate staff or training to accomplish the task is difficult. Supervisory personnel that are responsible for middle level schools should understand the implication to middle level schools when designing standards, benchmarks, and a scope and sequence to accomplish goals and objectives (Southern Forum to Accelerate Middle Grades Reform, 2000).

Middle level schools must take the lead in educating parents and community members in the desirable practices associated with the middle level concept. Parent forums and newsletters are two methods that could be utilized to assist in this endeavor. By involving all stakeholders in the implementation of the middle level concept, student success is much more likely (Jackson & Davis, 2000).

Homogeneously grouped classes remain in many middle level schools in order to compete effectively in attracting higher achieving students. It will be difficult for schools to discontinue this practice until district-wide decisions are made in this area. In addition, many teachers are reluctant or ill-prepared to differentiate instruction within a single class. Staff development in multiple intelligences theory and learning styles is necessary to remove this barrier (LMSIC, 1998).

### Recommendations for Further Research

Based on this study and review of the literature, the following recommendations for further research are made:

1. Research should be conducted to determine the most effective methods of staff development concerning the implementation of the Carnegie (1989) recommendations for middle level schools. With recommendations being made to provide staff development specifically designed for middle level educators, knowing the strategies that are most effective with teachers would be beneficial.

2. Research should be conducted to compare the level of implementation of the Carnegie (1989) recommendations and student and school outcomes in states that have specialized middle level certification with states that do not. This could lead to a definitive answer concerning the desirability of a special middle level certification.

3. Research should be conducted with the same sample utilizing a different instrument. The Carnegie Index of Middle School Transformation was used in the five-year longitudinal study conducted by Felner et al. (1997) and would offer a different perspective of middle level practices in Louisiana.

4. Research should be conducted to replicate this study utilizing a larger sample, perhaps middle school principals nationwide or at least in the Southern Region.

Much research remains to be done before the effectiveness of the Carnegie (1989) recommendations for middle level schools concerning student and school outcomes can be absolutely determined. However, the growing body of knowledge in

this area indicates that the implementation of selected components of the middle school concept does contribute to student and school success. Middle level educators must continue to remain cautious before accepting all recommendations for their schools. Each school is different. Therefore, it is up to the total school community to make appropriate decisions that will affect middle level students.

**APPENDIX A**

**LETTER REQUESTING USE OF THE MLPQ**

10007 Kedgwick Court  
Shreveport, LA 71118  
October 17, 1999

Dr. Myles M. Seghers  
Our Lady of Holy Cross College  
4123 Woodland Drive  
New Orleans, LA 70131-7399

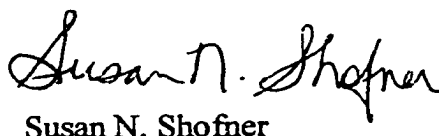
Dear Dr. Seghers:

I originally contacted you last spring and met you at the LMSA Conference in Lafayette to discuss the prospect of using your Middle Level Practices Questionnaire. I had hoped to be at the point of contacting you again several months ago, but the process has not gone as quickly as I had planned.

After meeting with members of my committee recently, I have the go-ahead to pursue research in the area of the middle school concept and its impact on student achievement. They have also agreed to allow me to use your questionnaire, if you are still willing to grant me permission to do so.

Therefore, I am now officially asking your permission to use the Middle Level Practices Questionnaire as the survey instrument for my dissertation research. I will secure permission from the "Human Subjects" committee at Louisiana Tech before conducting the research. Please respond in writing to this request, as I will need documented proof of your permission for the committee. If you have any questions, please feel free to call me at 318-861-2403 (school) or 318-687-5264 (home), or you may e-mail me at [SHOFNER02@aol.com](mailto:SHOFNER02@aol.com). I will look forward to hearing from you soon. Thank you so much for your help in this endeavor.

Sincerely,



Susan N. Shofner

**APPENDIX B**

**LETTER GRANTING PERMISSION TO USE MLPQ**



# Our Lady of Holy Cross College

*INNOVATORS IN EDUCATION SINCE 1916*

4123 WOODLAND DRIVE NEW ORLEANS, LOUISIANA 70131-7399 (504) 394-7744

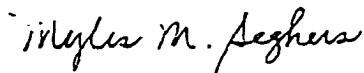
October 25, 1999

Susan Shofner  
10007 Kedgwick Court  
Shreveport, LA 71118

Dear Ms. Shofner:

Congratulations on receiving approval from your committee regarding the pursuit of research in the area of the middle-school concept. I do grant you permission to use the Middle Level Practices Questionnaire that I developed for my dissertation. Please keep me informed of your progress.

Sincerely,



Myles M. Seghers, Ph.D.  
Director of Student Teaching and  
Assistant professor

**APPENDIX C**  
**MIDDLE LEVEL PRACTICES QUESTIONNAIRE**  
**(MLPQ)**

## MIDDLE LEVEL PRACTICES QUESTIONNAIRE (MLPQ)

After reading the following description of the study, please indicate your permission to have your responses used by the researcher by marking the appropriate box below:

\_\_\_\_\_ Yes, I give my consent.                      \_\_\_\_\_ No, I do not give my consent.

This survey is divided into three parts. The first part asks you to determine the proportion of either teachers, parents, or students in your school who are involved in each of the educational practices listed. The second part solicits your level of agreement with statements regarding practices occurring in your school. The final section requests you to provide demographic information regarding your school.

This survey focuses ONLY on the MIDDLE LEVEL in your school. For the purposes of this survey, the middle level is defined as students in grades 6, 7, or 8.

### **PART I.**

**Directions:** Please determine the proportion of either teachers, parents, or students who are described by the following statements. Using the following key, respond by circling the letter that best describes each proportion.

**A=All    M=Most    S=Some    VF=Very Few    N=None**

- |    |                                                                                                                                                                                  |   |   |   |    |   |
|----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|---|----|---|
| 1. | Middle level teachers in our school are state certified to teach middle level students.                                                                                          | A | M | S | VF | N |
| 2. | Middle level teachers in our school are assigned as advisors and facilitate small groups of middle level students on a regular basis.                                            | A | M | S | VF | N |
| 3. | Middle level teachers in our school emphasize thinking skills and problem solving activities in their middle level classrooms.                                                   | A | M | S | VF | N |
| 4. | Middle level teachers throughout our school promote healthful lifestyles in their middle level classrooms.                                                                       | A | M | S | VF | N |
| 5. | Middle level teachers in our school integrate the subject matter across the various disciplines such as organizing thematic instructional units for their middle level students. | A | M | S | VF | N |
| 6. | Middle level teachers in our school use alternative assessment methods such as portfolio assessment in the evaluation of their middle level students.                            | A | M | S | VF | N |
| 7. | Middle level teachers in our school determine what and how subject matter should be taught to middle level students.                                                             | A | M | S | VF | N |

**Please go on to the next page ⇒**

## PART I.—continued

A=All M=Most S=Some VF=Very Few N=None

- |     |                                                                                                                                                                                                                                                                                                     |   |   |   |    |   |
|-----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|---|----|---|
| 8.  | Middle level teachers in our school are organized into interdisciplinary teams (i.e., the organization of two or more teachers from different disciplines who share the same group of students and share responsibility for the curriculum, instruction, and evaluation of that group of students). | A | M | S | VF | N |
| 9.  | Middle level teachers in our school receive regular staff development specifically targeting the needs of young adolescents.                                                                                                                                                                        | A | M | S | VF | N |
| 10. | Middle level teachers in our school inform middle level parents of the progress of their children through means other than report cards and district mandated progress reports.                                                                                                                     | A | M | S | VF | N |
| 11. | Middle level teachers in our school have a major role in the decision-making concerning the education of the middle level students.                                                                                                                                                                 | A | M | S | VF | N |
| 12. | Middle level teachers in our school are specially trained to teach young adolescents.                                                                                                                                                                                                               | A | M | S | VF | N |
| 13. | Middle level teachers in our school work collaboratively with parents in an effort to ensure that all young adolescents will succeed.                                                                                                                                                               | A | M | S | VF | N |
| 14. | Middle level teachers and administrators in our school promote healthy behavior by modeling healthy practices (e.g., no smoking, healthy diets, etc.)                                                                                                                                               | A | M | S | VF | N |
| 15. | Middle level teachers and students in our school are organized into smaller units such as "houses" or "schools-within-schools."                                                                                                                                                                     | A | M | S | VF | N |
| 16. | Middle level students in our school are learning life skills through participation in school and community service.                                                                                                                                                                                 | A | M | S | VF | N |
| 17. | Middle level students in our school are heterogeneously grouped (i.e., mixed by academic ability) for instruction in the core courses.                                                                                                                                                              | A | M | S | VF | N |

**Please go on to the next page ⇒**

**PART I.—continued**

A=All M=Most S=Some VF=Very Few N=None

- |     |                                                                                                                                                                                              |   |   |   |    |   |
|-----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|---|----|---|
| 18. | Middle level students in our school participate in exploratory or “mini” courses where they can experience success in a variety of interest areas.                                           | A | M | S | VF | N |
| 19. | In addition to regularly scheduled class periods, middle level students in our school have structured learning opportunities at times such as before school, during lunch, and after school. | A | M | S | VF | N |
| 20. | Middle level students in our school participate in a community service project.                                                                                                              | A | M | S | VF | N |
| 21. | Middle level students in our school receive periodic career guidance.                                                                                                                        | A | M | S | VF | N |
| 22. | Middle level students in our school are taught to think critically to prepare them for the responsibilities of citizenship in a pluralistic society.                                         | A | M | S | VF | N |
| 23. | The parents of our school’s middle level students actively participate in the governance and decision-making process of our school.                                                          | A | M | S | VF | N |

**PART II.**

Directions: Please determine the degree to which you agree or disagree with each of the following statements about YOUR school. Using the following scale, respond by circling the letter that best describes this degree.

**SA=Strongly Agree A=Agree N=Neutral D=Disagree SD=Strongly Disagree**

- |     |                                                                                                                                                 |    |   |   |   |    |
|-----|-------------------------------------------------------------------------------------------------------------------------------------------------|----|---|---|---|----|
| 24. | Our school uses a flexible or block schedule for the middle level students.                                                                     | SA | A | N | D | SD |
| 25. | Our school has a school governance committee where middle level teachers and administrators participate in and practice shared decision-making. | SA | A | N | D | SD |
| 26. | Our school provides our middle level teachers opportunities to assume leadership positions such as house or team leaders.                       | SA | A | N | D | SD |

**Please go on to the next page ⇒**

**PART II.—continued****SA=Strongly Agree A=Agree N=Neutral D=Disagree SD=Strongly Disagree**

- |     |                                                                                                                                                                                   |    |   |   |   |    |
|-----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|---|---|---|----|
| 27. | Our school provides assistance to middle level students in securing health services when needed.                                                                                  | SA | A | N | D | SD |
| 28. | Our school has developed and implemented programs and practices to create a school environment that is emotionally and physically safe for both middle level students and adults. | SA | A | N | D | SD |
| 29. | Our school gives middle level parents the opportunity to work in the school in various capacities.                                                                                | SA | A | N | D | SD |
| 30. | Our school provides middle level parents assistance in how to help their children to learn at home.                                                                               | SA | A | N | D | SD |
| 31. | Our school works cooperatively with community businesses, service clubs, and foundations to provide resources for middle level students and teachers.                             | SA | A | N | D | SD |
| 32. | Our school is a place where close, trusting relationships with adults and middle level students create a climate for personal growth and intellectual development.                | SA | A | N | D | SD |
| 33. | Our school provides a climate that promotes healthy lifestyles for middle level teachers and students.                                                                            | SA | A | N | D | SD |
| 34. | Our school provides middle level students the opportunity to succeed in every aspect of the academic program, regardless of previous achievement or the pace in which they learn. | SA | A | N | D | SD |
| 35. | Our school works with community organizations to share the responsibility for ensuring the success of the middle level students.                                                  | SA | A | N | D | SD |
| 36. | One criterion for hiring middle level teachers in our school is their strong commitment to work with middle level students.                                                       | SA | A | N | D | SD |

**Please go on to the next page ⇒**

**PART III.**

Directions: Please read each statement and/or question about your WHOLE school and respond appropriately.

A. Which option best describes the grade configuration of your school? (Circle one.)

6-8    7-8    5-8    7-9    4-8    4-7    5-7    6-9

B. Please classify your school: (Circle one.)

**Rural**            **Small Town**            **Large Town**            **City**

C. How many students are currently enrolled in your school? \_\_\_\_\_

D. How many new teachers did your hire this year to replace teachers who left for reasons other than death or retirement? \_\_\_\_\_

E. What percentage of students in your school are currently on free or reduced lunch? \_\_\_\_\_

F. How many of the following people work at your school?

	<b>Full time</b>	<b>Part time</b>
Classroom teachers	_____	_____
Assistant Principals	_____	_____
School Nurses	_____	_____
School Counselors	_____	_____

**Please Note: The following questions pertain to the 1999-2000 school year.**

G. What was the approximate PERCENTAGE of your school's daily attendance during the 1999-2000 school year? \_\_\_\_\_

H. How many suspensions did your school have during the 1999-2000 school year? \_\_\_\_\_

I. How many expulsions did your school have during the 1999-2000 school year? \_\_\_\_\_

**Thank you for participating in this survey!!**

**APPENDIX D**

**MLPQ ITEMS ACCORDING TO EIGHT SUBSCALES**



MLPQ Items According to Eight Subscales

**Subscale 1:                    Curriculum and Instruction**

<u>MLPQ Statement</u>	<u>Item</u>
Middle level teachers in our school are certified to teach middle level students.	C1
Middle level teachers in our school emphasize thinking skills and problem solving activities in their middle level classrooms.	C3
Middle level teachers in our school integrate the subject matter across the various disciplines.	C5
Middle level teachers in our school use alternative assessment methods such as portfolio assessment in the evaluation of their middle level students.	C6

**Subscale 2:                    Governance and Decision-Making**

<u>MLPQ Statement</u>	<u>Item</u>
Middle level teachers in our school determine what and how subject matter should be taught to middle level students.	C7
Middle level teachers in our school are organized into interdisciplinary teams.	C8
Middle level teachers and students in our school are organized into smaller units such as "houses" and "schools-within-schools."	C15

<u>MLPO Statement</u>	<u>Item</u>
Our school uses a flexible or block schedule for the middle level students.	C24
Our school has a governance committee where middle level teachers and administrators participate and practice shared decision-making.	C25
Our school provides our middle level teachers opportunities to assume leadership positions such as house or team leaders.	C26

**Subscale 3:            **Parental Involvement****

<u>MLPO Statement</u>	<u>Item</u>
Middle level teachers in our school inform middle level parents of the progress of their children through means other than report cards and district mandated progress reports.	C10
The parents of our school's middle level students actively participate in the governance and decision-making process of our school.	C23
Our school gives middle level parents the opportunity to work in the school in various capacities.	C29
Our school provides middle level parents assistance in how to help their children learn at home.	C30

(continued)

**Subscale 4: Variety of Learning Opportunities**

<u>MLPO Statement</u>	<u>Item</u>
Middle level students in our school are learning life skills through participation in school and community service.	C16
Middle level students in our school participate in exploratory or "mini" courses where they can experience success in a variety of interest areas.	C18
In addition to regularly scheduled class periods, middle level students in our school have structured learning opportunities at times such as before school, during lunch, and after school.	C19
Middle level students in our school participate in a community service project.	C20
Middle level students in our school receive periodic career guidance.	C21

**Subscale 5: Commitment to Young Adolescents**

<u>MLPO Statement</u>	<u>Item</u>
Middle level teachers in our school are assigned as advisors and facilitate small groups of middle level students on a regular basis.	C2

(continued)

<u>MLPO Statement</u>	<u>Item</u>
Middle level teachers in our school receive regular staff development specifically targeting the needs of young adolescents.	C9
One criterion for hiring middle level teachers in our school is their strong commitment to work with middle level students.	C36

**Subscale 6:            Safety and Resources**

<u>MLPO Statement</u>	<u>Item</u>
Our school provides assistance to middle level students in securing health services when needed.	C27
Our school has developed and implemented programs and practices to create a school environment that is emotionally and physically safe for both middle level students and adults.	C28
Our school works cooperatively with community businesses, services clubs, and foundations to provide resources for middle level students and teachers.	C31

**Subscale 7:            Health Promotion**

<u>MLPO Statement</u>	<u>Item</u>
Middle level teachers throughout our school promote healthful lifestyles in their middle level classrooms.	C4

(continued)

<u>MLPQ Statement</u>	<u>Item</u>
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Middle level teachers and administrators in our school promote healthy behavior by modeling healthy practices.	C14
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**Subscale 8:            Ability Grouping**

<u>MLPQ Statement</u>	<u>Item</u>
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Middle level students in our school are heterogeneously grouped (i.e., mixed by academic ability) for instruction in the core courses.	C17
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**APPENDIX E**  
**LETTER REQUESTING PERMISSION**  
**OF SUPERINTENDENTS**

**BROADMOOR MIDDLE LABORATORY SCHOOL****441 Atlantic Avenue****Shreveport, Louisiana 71105****(318) 861-2403**

DATE

NAME LAST  
 SCHOOL DISTRICT  
 ADDRESS  
 CITY STATE ZIP

Dear SUPERINTENDENT :

As a middle school principal in Louisiana, I share your concern about meeting the diverse needs of our students. I am currently a doctoral student in the Louisiana Education Consortium which is comprised of Louisiana Tech University, Grambling State University, and the University of Louisiana at Monroe.

I am conducting a study that will examine the educational practices in middle level education in Louisiana. This study is based on the perceptions of middle level principals concerning the implementation of the middle school concept and its effect on student achievement. I would like to survey principals of schools in your district that are classified as "middle schools" by the Louisiana Department of Education.

The survey instrument that will be used is the Middle Level Practices Questionnaire. It consists of 36 statements to which principals will respond using a 5-point Likert scale. The participation of principals will be entirely voluntary, and they may withdraw consent and terminate participation, or leave answers blank at any time without consequence. All information will remain confidential. No names of people or schools will ever be used.

Please indicate your consent for principals to participate at the bottom of this letter, and return your answer at your earliest convenience in the self-addressed, stamped envelope provided. The survey will be distributed immediately upon receipt of your approval. Thank you for your time and cooperation in this endeavor.

Sincerely,

Susan N. Shofner  
 Principal

\_\_\_\_\_ Yes, I give consent for principals in my district to participate in the survey.

\_\_\_\_\_ No, this system will not participate in the survey.

\_\_\_\_\_  
 Superintendent or Designee

\_\_\_\_\_  
 School District

\_\_\_\_\_  
 Date

**APPENDIX F**  
**COVER LETTER FOR FIRST MLPQ MAILING**



**BROADMOOR MIDDLE LABORATORY SCHOOL****441 Atlantic Avenue****Shreveport, Louisiana 71105****(318) 861-2403**

DATE

NAME            LAST  
 SCHOOL  
 ADDRESS  
 CITY            STATE            ZIP

Dear NAME            :

As a middle school principal in Louisiana, I share your concern about meeting the diverse needs of our students. Throughout my tenure as a middle level educator for the past 20 years, I have witnessed many changes. I am currently a doctoral student in the Louisiana Education Consortium which is comprised of Louisiana Tech University, Grambling State University, and the University of Louisiana at Monroe.

I am conducting a study that will examine the educational practices in middle level education in Louisiana. This study is based on the perceptions of middle level principals concerning the implementation of the middle school concept and its effect on student achievement; therefore, I need you help. Your participation is entirely voluntary and you may withdraw consent and terminate participation at any time without consequence.

To participate in this state-wide study, please complete the questionnaire included in this mailing and return it in the enclosed postage-paid envelope. Your consent to participate should be indicated by checking "yes" or "no" in the appropriate blank at the top of the questionnaire. Please return the completed questionnaire by DATE. I can assure you that all responses will remain confidential. Your responses will be grouped with those from principals throughout the state. No names of people or schools will ever be used.

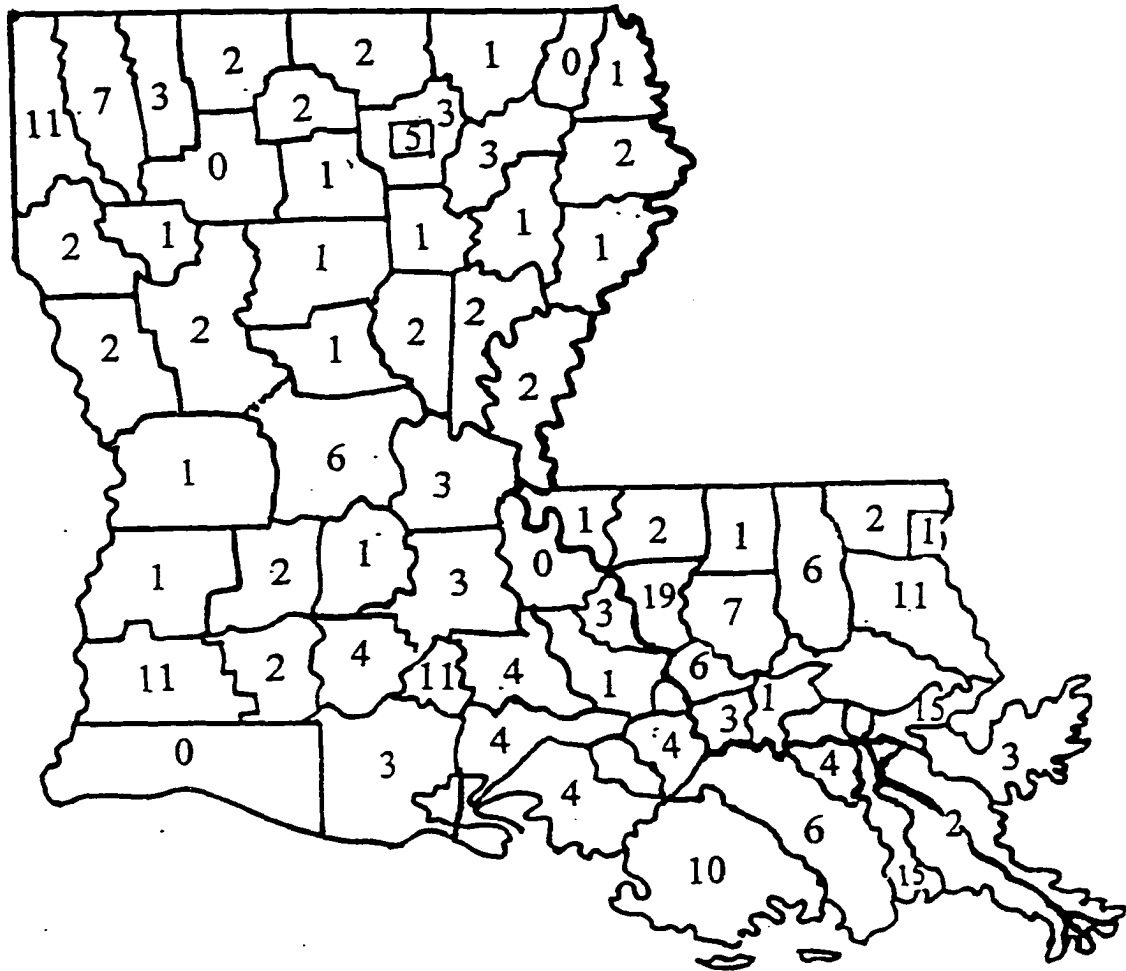
As a concerned middle level educator in Louisiana, I know you will agree that we can all benefit from a study of this nature as we strive to improve education in the middle grades. I know you are extremely busy, but know that the time spent on this questionnaire will be beneficial to the middle level students of our state. Thank you for taking time to complete this survey.

Sincerely,

Susan N. Shofner  
 Principal

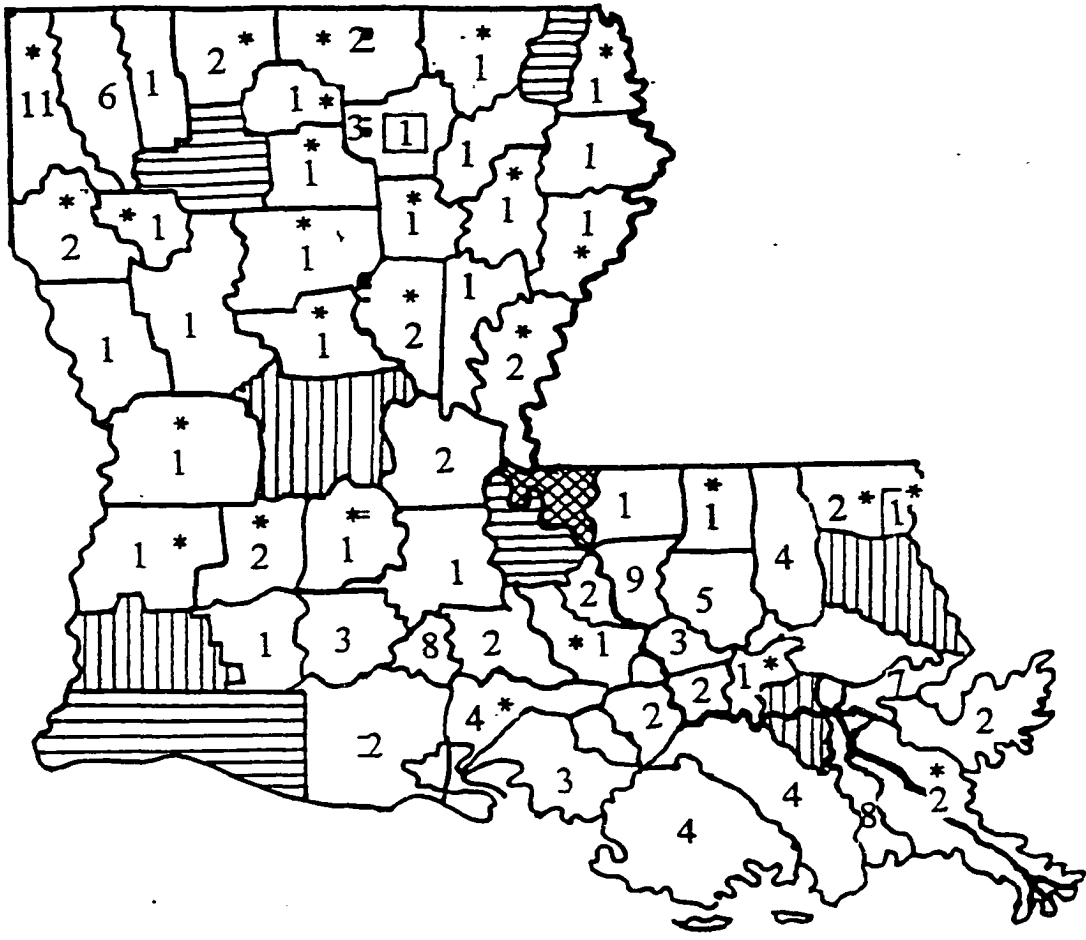
**APPENDIX G**  
**LOUISIANA MAP INDICATING TOTAL**  
**MIDDLE LEVEL SCHOOLS BY PARISHES**

Distribution of Schools Designated as Middle Schools  
by the Louisiana Department of Education, 1999-2000



**APPENDIX H**  
**LOUISIANA MAP INDICATING RESPONDING**  
**MIDDLE LEVEL SCHOOLS BY PARISHES**

Distribution of Middle Level Schools Whose Principals Responded to the MLPQ



- ☐ School districts with no schools labeled as "middle" by LDE
- ▨ School districts whose superintendents did not allow MLPQ distribution
- School districts whose principals participated in MLPQ
- ▩ School districts whose principals did not participate in MLPQ
- \* School districts with 100% return rate of MLPQ

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## VITA

Susan N. Shofner is a native of Shreveport, Louisiana where she graduated from Southwood High School. She completed the requirements for the Bachelor of Sciences degree in secondary education, with a major in business education and a minor in social studies, in 1978 at Louisiana Tech University.

Upon graduation Shofner returned to Southwood High School in Shreveport and began her teaching career. In addition to Southwood, Shofner taught at Ridgewood Junior High, Caddo Parish Middle Magnet School, and Broadmoor Middle Laboratory School. She served as a pilot teacher for both Project Justice and Learning Styles in the Caddo Parish School System.

Shofner earned the Master of Education degree from Louisiana State University in Shreveport in 1982 and completed 30 additional graduate hours, including administrative certification, from Centenary College in 1993. She also participated in the Caddo Parish Administrative Intern Program in 1994-95.

She began her administrative career as Assistant Principal of Curriculum and Instruction at J. S. Clark Middle School in Shreveport where she served from 1995-97. It was during this time that she began work toward a doctorate in Educational Administration. Shofner then became Assistant Principal of Curriculum and Instruction at Broadmoor Middle Laboratory School in 1997, a position she held until being named Principal of Broadmoor in 2000.